

***HIGHLANDS VISITOR
SURVEY, 1997
ROSS AND CROMARTY
Final Report***

Prepared for :

*Highlands & Islands Enterprise
Highland Council
Highlands of Scotland Tourist Board
Ross and Cromarty Enterprise*

*HIE 3090
JANUARY 1999*

Contents

Executive summary	i
A. Background and Methods	1
Background.....	1
Definition of Visitors.....	2
Survey Method.....	2
B. Main Findings.....	6
Reasons for Visiting	6
Visitor Profile.....	10
Motivations for visiting.....	18
Marketing Influences	20
Length of Stay	23
Previous Visits.....	25
Visits to other parts of the Highlands.....	27
Transport Used	28
Accommodation	30
Activities Undertaken	33
Attractions visited and levels of satisfaction.....	36
Use of Tourist Information Centres and levels of satisfaction	39
Levels of satisfaction with shops, pubs and restaurants	42
Overall levels of Satisfaction	44
Local Foods and Drinks Have Purchased/Intend to Purchase.....	48
Expenditure in Ross and Cromarty.....	49
C. Multivariate Analysis	53
Multi-Variate Analysis – the Process.....	53
Visits to Wester Ross – 6% Share overall	55
Visits to Easter Ross – 7% Share overall	56
D. Appendix 1: Social Class.....	58
E. Appendix 2: Questionnaires	59

Executive summary

- 95% of visitors to the Ross and Cromarty area were staying away from home, with the majority (83%) on holiday away from home. Only 5% of visitors were on a day trip from home;
- The majority of trips taken were not touring in nature: over half of those visiting the Ross and Cromarty area were staying in one location and taking day trips from there (54%);
- With 57% of visitors aged 45+ years, the age profile of visitors to the area was relatively old: 51% of visitors to the Highlands as a whole were aged 45+ years;
- Visitors to the area were very upmarket in profile: 69% were ABC1s, particularly visitors from overseas, those on touring holidays (staying in more than one location), and those staying in self-catering units;
- Average party size amongst visitors to the area was 2.46 people, a slightly smaller party size than the average for the Highlands as a whole (2.76), and partly a reflection of the smaller proportion of visitors who had children with them (17%);
- Over a third of visitors were from Scotland (36%), around four in ten were from elsewhere in the UK (45%), and the remaining 19% were from overseas;
- The main reasons for the trip to the Highlands related to aspects of the Highland scenery (25%);
- Two key influences on the decision to visit the Highlands emerged: a previous visit to the area (63%), and advice from friends or relatives (31%), both reflecting the importance of informal sources of information;
- 12% of visitors had been influenced by tourist brochures. Amongst these respondents, 22% mentioned the HOST main guide, 29% the STB main UK guide, and likewise 29% the STB overseas guide;

- Typically, tourists visiting the Ross and Cromarty area were staying away from home for 10.4 nights, spending 7.9 nights in the Highlands, and 4.0 nights locally;
- Around three in ten visitors to the Ross and Cromarty area were on their first ever trip to the Highlands (28%); 44% were on their first ever trip to the local area. There are a large proportion of frequent, loyal visitors however: 42% had been to the Highlands four or more times previously;
- Over half of those visiting the Ross and Cromarty area were also visiting Inverness, Loch Ness and Nairn (62%), whilst just over a third were each visiting Skye (34%) and the Sutherland area (34%);
- Almost two-thirds of visitors used their own car on their journey to the Highlands (65%), whilst 9% used a rental car. Similar proportions used these forms of transport whilst there;
- Hotels and motels were the most popular forms of accommodation (25%), followed by bed and breakfasts (23%) and self-catering accommodation (20%). Visitors were generally satisfied with both the quality of service and facilities in their accommodation - 68% and 73% respectively;
- Over half of the visitors to the Ross and Cromarty Enterprise area took part in some outdoor/sporting activities on their visit (58%), with low level walking (41%) easily the most popular individual activity;
- Nine in ten visitors (92%) undertook general sightseeing or touring, around five in ten visitors went shopping (48%), whilst a third visited museums, art galleries and heritage centres (33%);
- The most popular attraction in the Ross and Cromarty area was Inverewe Gardens (24% of respondents visited), followed by Gairloch Heritage Museum (10%), Ullapool Museum (10%), Cromarty Courthouse (9%), and Highland Museum of Childhood (26%);
- Satisfaction levels with attractions visited in the Highlands were very high: nearly half (47%) described the quality of service as “very good”, whilst 46% described the facilities on offer in similar terms;

- Nearly two thirds of respondents had visited or intended visiting a TIC on their trip to the Highlands (66%). Again, levels of satisfaction with both the quality of service and facilities in Highland TICs were very high;
- The three most popular food and drink products visitors had bought or intended buying during their visit in the area were bakery products (47%), shortbread (46%) and malt whisky (33%);
- A quarter of visitors described their trip to the Ross and Cromarty area as better than expected (25%). The weather, scenery and the fact there was more to do than they had anticipated were the main reasons for this response. Only 1% of respondents described it as poorer than expected;
- Over half could not think of any improvements which the local bodies responsible for tourism could have made which would have made their trip more enjoyable (55%). Amongst those who did feel improvements could have been made, no single improvement was mentioned by more than 7% of respondents;
- Typically, respondents in the RACE area spent £79 per day during their trip to the Highlands on themselves and others in their party, a significantly lower amount than the average in the Highlands as a whole. This averaged out at a spend of £37 per person per day;
- In terms of total trip spending per party in Ross and Cromarty, the average spend was around £370. The highest spenders were those staying in self-catering establishments (£656), a reflection of their long stays locally and larger party sizes. On the other hand, lowest spenders were those on touring holidays (staying in more than one location) and overseas visitors (each at less than £200);
- From some multivariate analysis of the data, it is clear that Wester Ross was particularly popular amongst visitors from Scotland outwith the Highlands – particularly those without any children in their household. Similarly, the area was popular amongst overseas visitors without any dependent children. Conversely, it was less popular than average amongst overseas residents who had children in their household;
- The profile for Easter Ross was rather different when the data was subjected to some multi-variate analysis. This area was more popular amongst UK residents – particularly Highland residents and those from

other parts of Scotland. All five segments with above average likelihood to visit were from within the UK – overseas segments all had lower than average likelihood to visit the area. There was also some indication that the area held greatest appeal amongst older visitors – three of the top 5 segments for the area comprised people aged over 35 years.

A. Background and Methods

Background

With tourism accounting for around a fifth of the economy of the Highlands and Islands, the importance of this industry to the area is clear. Estimates from the United Kingdom Tourism Survey (UKTS) and the International Passenger Survey (IPS) suggest that in 1994, over 2.7 million tourist trips were made to the area by both UK and overseas tourists.

Highlands and Islands Enterprise (HIE) is responsible for both business development and tourism skills in the area, whilst the responsibility for marketing lies within the remit of the **Area Tourist Boards (ATBs)** and the **Scottish Tourist Board (STB)**. The **local authorities** in the area also have an involvement in tourism, both in the provision of visitor attractions and events, but also through their economic development departments.

All of these agencies have a clear need for comprehensive information regarding the **volume, value, profile** and **characteristics** of visitors coming to the Highlands and Islands. In the past, there has been a reliance on the main national surveys (UKTS and IPS) for such data along with occasional and ad hoc visitor surveys in some parts of the Highlands and Islands. In some areas however, no real visitor research has been undertaken.

Consequently, during 1996, Highlands and Islands Enterprise commissioned System Three to conduct a **Visitor Survey Method Study** to recommend the most appropriate series of methods for conducting visitor surveys throughout the Highlands and Islands. These recommendations have subsequently been adopted by HIE when conducting visitor surveys.

Taking this work forward, **Highlands and Islands Enterprise** together with the **Highland Council** and **Highlands of Scotland Tourist Board** commissioned System Three to conduct a major visitor survey throughout the Scottish Highlands during March to November of 1997. This series of surveys covered all parts of the mainland, but did not include the Western or Northern Isles or the Argyll area.

The main **objectives** of this study were as follows:

- produce estimates of volume and value of visitors to the Highlands as a whole, and at the local level;
- supply information about the visitors and their visit to guide future tourism policy decisions;
- provide baseline information which can be updated in future studies.

This report covers the main findings to have emerged from the surveys undertaken in the **Ross and Cromarty Enterprise (RACE) area**. Similar reports have been produced to cover the other parts of the Highlands, namely: Caithness, Sutherland, Moray, Badenoch and Strathspey, Inverness, Loch Ness and Nairn, Isle of Skye and Lochalsh and Lochaber. In addition, a separate report has been produced covering the Highlands as a whole which provides a combination of the findings from each of the local areas.

Definition of Visitors

The survey covered all visitors to the Highlands on a holiday trip, those visiting friends and relatives on holiday, those staying away from home overnight on business, and people on a day trip from home. Residents of the Highlands on a leisure day out were also included within the sampling framework on the basis that they were interviewed at locations popular with day visitors and tourists alike (visitor attractions, scenic sites and town centres). A maximum quota was used to ensure that Highland residents did not dominate the sample, although in the event, this was not an issue.

Survey Method

The main survey method used throughout the study period was a programme of **face-to-face interviews** with a representative sample of visitors to the Highlands.

The efficacy of this methodology for visitor surveys is dependent on the careful selection of the **interview locations**. It was vital at the outset that the choice of sites reflected those locations in the Highlands most likely to be visited by visitors. It was important to ensure that the omission of one particular location(s) did not lead to the exclusion of a certain type of visitor from the sample. For the maximisation of the interviewer resources, it was also important that the sites chosen as interview locations were all capable of sustaining an adequate throughput of visitors on a daily basis.

In total, some 3,301 interviews were undertaken throughout the Highlands during the March to November period. Some 405 interviews were undertaken in the Ross and Cromarty area: 221 in Easter Ross and 184 in Wester Ross. The interview sites used are indicated below in Table A-1.

Table A-1 - Interview locations: Ross and Cromarty Enterprise area (%)

Base: 405 interviews with visitors

	% Interviews undertaken
Easter Ross	55
Strathpeffer village centre	22
Dingwall Town Centre	18
Chanonry Point, Fortrose, Black Isle	11
Cromarty Court House	3
Wester Ross	45
Ullapool Town Centre - ferry departure area	18
Inverewe Gardens	8
Torridon Visitor Centre, Torridon	7
Lochcarron TIC	6
Inverpolly National Nature Reserve	4
Gairloch car park and harbour	2
Total:	100

Each interview location was carefully chosen and a number of criteria were taken into account including:

- each offered a position which would intercept visitors as they leave a location and which would cause the minimum disruption to the throughput of visitors to the location
- where possible, there was a position which afforded the opportunity for the interviewer and respondent to sit down for the duration of the interview, and if possible, a position which provided some protection from the weather.

In some potential interview locations, such as town centre sites (e.g. Dingwall), intercepting visitors as they passed a specified point replaced the requirement to make contact as they leave an interview location.

Respondents were selected on the basis of the **next person to leave**, or pass the interviewer on completion of the previous interview. Such an approach ensures the random selection of respondents whilst maximising the interviewer resource. In those situations where a family or group of people passed the interviewer together, the "**next birthday**" rule was applied to maintain this random selection procedure as it would be inappropriate for the oldest member of the party to always assume responsibility for the conduct of the interview.

The sample of **405 completed interviews** in the area represents a large and suitably robust sample for analysis of the characteristics of visits made to the Ross and Cromarty Enterprise area in 1997: at the 95% levels of confidence, results are accurate to plus or minus 4.9%. The interviews were conducted throughout the May to November period, taking account of the following factors:

- survey days were rotated across the various days of the week;
- survey days were rotated across the various weeks of the month;
- interviews were conducted at various times of the day between 10am and 8pm.

The daily and monthly breakdown of interviews undertaken in the Ross and Cromarty areas is indicated below:

Table A-2 - Day and Month of Interviews (%)

Base: 405 interviews with visitors to Ross & Cromarty area

	Interviews undertaken		Interviews undertaken
Monday	11	May	8
Tuesday	3	June	14
Wednesday	20	July	22
Thursday	15	August	30
Friday	14	September	20
Saturday	27	October	3
Sunday	9	November	2
Total	100	Total	100

Some 36% of the interviews were conducted at the weekend, reflecting the large number of visits made to tourist attractions and sites at that time of the week. Similarly, over half of the interviews were conducted during July and August (52%) to reflect the seasonal nature of tourism in the Highlands.

An interpretation and analysis of the full results and findings to emerge from the interviews in the Ross and Cromarty Enterprise area follows in Section B. Where appropriate, comparisons have been made with the overall findings for the Highlands as a whole. Multivariate analysis of the Ross and Cromarty datasets was also undertaken in order to identify the key market segments for the area. The results of this exercise are described in Section C.

B. Main Findings

Reasons for Visiting

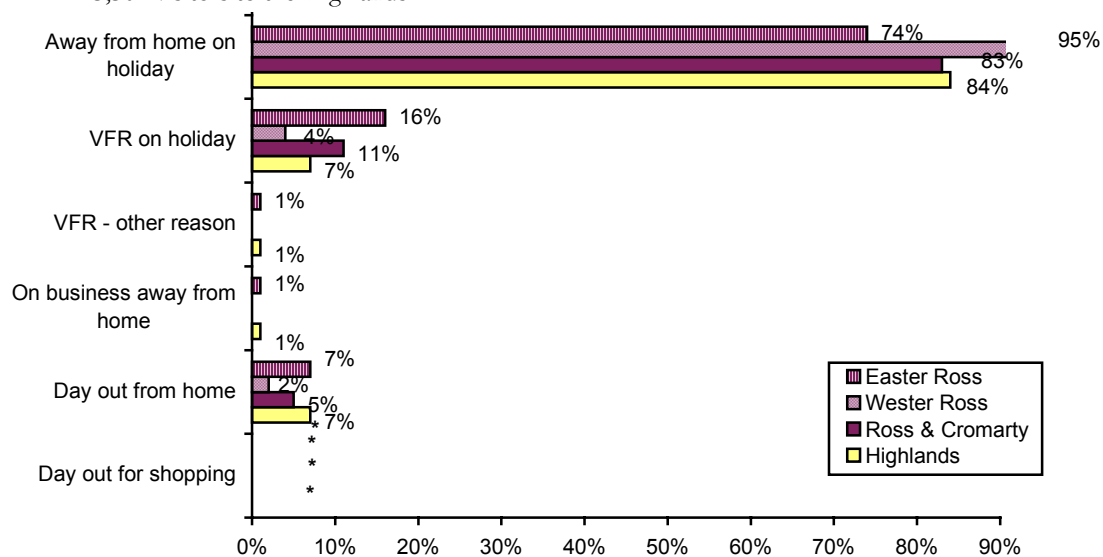
Purpose of Visit

The majority of visitors to the Ross and Cromarty Enterprise area were staying away from home overnight (95%). In terms of the types of trips undertaken by visitors to the Ross and Cromarty area, the majority of visitors were 'on holiday away from home' (83%), a similar proportion to that in the Highlands as a whole (84%). Around one in ten visitors (11%) were 'visiting friends and relatives on holiday', a slightly higher proportion than the Highlands as a whole (7%).

Figure B-1 - Purpose of Visit: Ross & Cromarty Enterprise Area

Base: 405 visitors to Ross & Cromarty area;

3,301 visitors to the Highlands



* - less than 1%

There were some variations between the different parts of the Ross and Cromarty area: a higher proportion of visitors to Easter Ross were visiting friends and relatives (16%) than in Wester Ross (4%). Moreover, the proportion of holiday visitors was significantly higher in Wester Ross (95%) than in Easter Ross (74%).

There were some further variations in the purpose of trip profile to the Ross and Cromarty area amongst the different market segments:

- *Social class*: a higher proportion of ABC1's were on holiday (96%) compared with 89% of C2DE's. Conversely, C2DE's were more likely to be on a day trip (9%) compared with 3% of ABC1's;
- *Seasonality*: visitors interviewed between May to September were more likely to be on holiday (95%) compared with 84% of visitors interviewed in the shoulder months of October and November. Conversely, visitors interviewed in October and November were more likely to be day trippers (13%) than in the earlier spring/summer months (4%);
- *Origin*: not surprisingly visitors from the Highlands were more likely to be on a day trip (62%)

Type of Stay

Respondents who were staying away from home were asked to indicate the extent to which their visit was 'touring' in nature as opposed to a 'centred' trip. Just over half of the trips to the Ross and Cromarty area were not touring in nature (54%), a similar proportion recorded in the Highlands as a whole (53%). Interestingly, touring holidays were significantly more common in Wester Ross (57%) than in Easter Ross (36%).

Table B-1 - Type of Stay in the Highlands (%)

Base: 386 visitors to Ross & Cromarty area staying away from home;
2,936 visitors to the Highlands staying away from home

	Overnight visitors to Easter Ross	Overnight visitors to Wester Ross	Overnight visitors to Ross & Cromarty	Overnight visitors to Highlands
- Staying in one main location in the Highlands and taking day trips from there	64	43	54	53
- Touring around staying in 2 or 3 locations during visit to the Highlands	20	35	27	29
- Touring around the Highlands, staying in more than 3 locations	16	22	19	17
Total:	205	181	386	100

There were some major variations in the types of trips taken by different market segments in the Ross and Cromarty area:

- *Age:* older visitors were more likely to be on a one centre holiday than younger visitors. Some 61% of visitors aged 35+ years were staying in one location compared with 37% of visitors aged under 35 years;
- *Social Class:* C2DE's were more likely to be staying in just one location (58%) than ABC1s (53%);
- *Accommodation:* visitors to the Ross and Cromarty area staying in self-catering accommodation (78%) or in hotels and guest houses (62%) were much more likely to be staying in only one location whereas those staying in B&B's (76%) and caravans/tents (71%) were more likely to be on touring holidays.
- *Origin:* amongst those interviewed in the Ross and Cromarty area, almost seven in ten Scots visitors (68%), and 60% of other UK visitors were staying in one location in the Highlands compared with 18% of overseas visitors. Overseas visitors were therefore considerably more likely to be

touring: 39% staying in two or three locations and a further 42% staying in more than three locations;

- *Previous visits:* those on their first ever trip to the Highlands were more likely to be touring (46%), than those who had visited before (22%);
- *Length of stay:* those staying for three nights or less were more likely to be staying in one location (77%) compared with 38% spending eight or more nights in the Highlands.

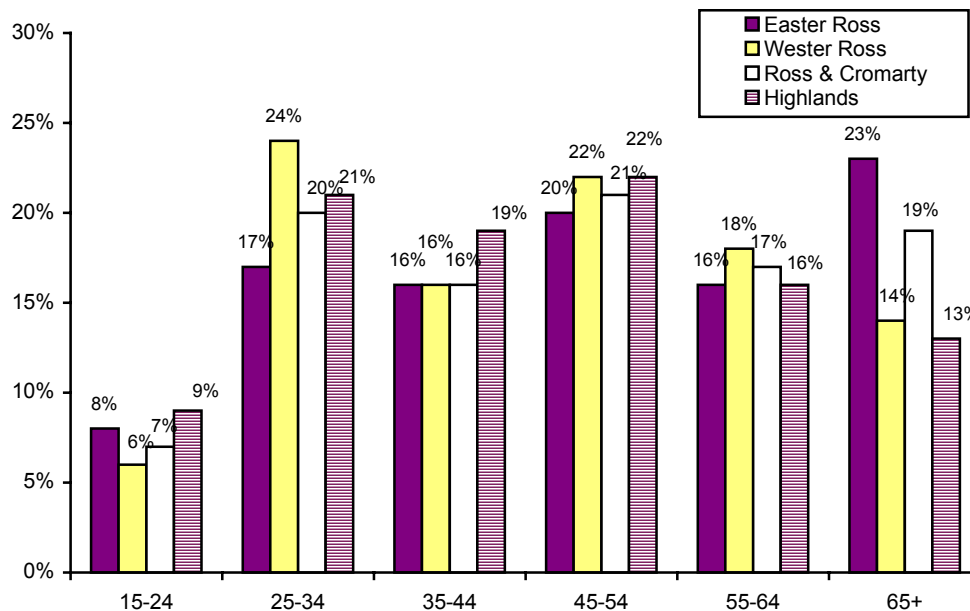
Visitor Profile

Age

The age groups of visitors to the Ross and Cromarty area are shown below:

Figure B-2 - Age of Visitors to the Ross and Cromarty Enterprise area

Base: 405 visitors to Ross & Cromarty area;
3,301 visitors to the Highlands



The age profile of visitors to the Ross and Cromarty area is slightly older than the profile of tourists visiting Scotland as a whole: 27% of visitors to the area were under 35 years compared with around 30% of tourists to Scotland (UKTS and IPS estimates). This is also a slightly older profile than that for visitors to the Highlands as a whole, 30% of whom were aged under 35 years. Conversely, whilst three in ten visitors to the Highlands were aged 55+ years (29%), over a third of visitors to the Ross and Cromarty area were in this age grouping (36%).

The age profiles of visitors to the Easter Ross and Wester Ross areas varied to a certain extent with the former area attracting a higher proportion of older visitors than the latter: 30% of visitors to Wester Ross were aged under 35 years compared with 25% of visitors to Easter Ross whilst 23% of visitors to Easter Ross were aged 65+ years compared with 14% of visitors to Wester Ross.

As would be expected, the age profile of visitors to the Ross and Cromarty Enterprise area varied by different categories of visitor:

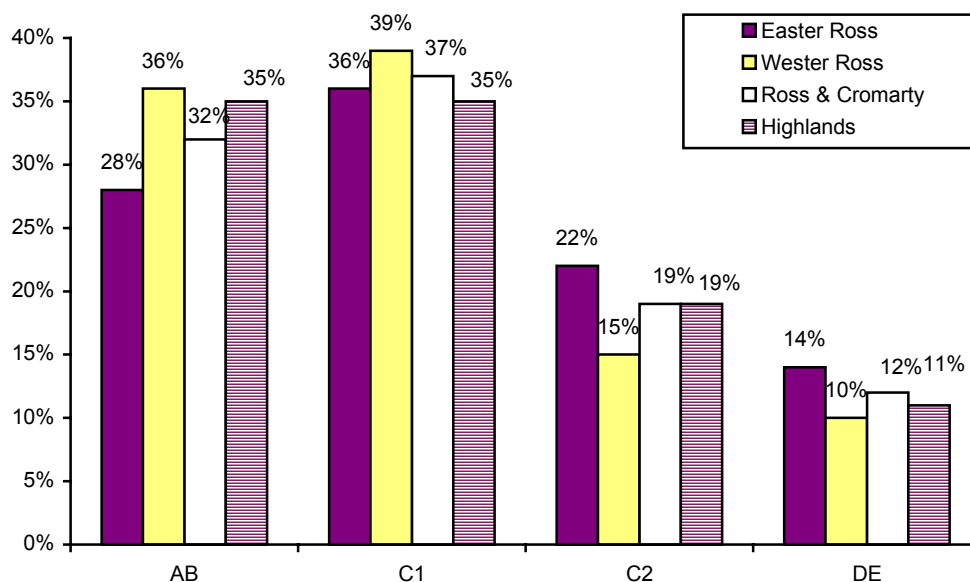
- *Type of trip*: a larger proportion of those on a touring trip to the Highlands were under 35 years (52%) than those staying in one location (19%);
- *Accommodation*: those visitors staying in hotels and guesthouses were more likely to be older (64% of visitors aged 55+ years were staying in hotels and guesthouses) than in any other accommodation type whilst caravanning and camping was most popular amongst visitors under 35 years (48%);
- *Time of year*: visitors to the area between May and September were more likely to be aged under 35 years (28%) compared with 17% of those visiting outwith this period. Off-peak trips to the area were more likely to be made by older visitors: 71% were aged 45+ years compared with 56% of those who visited between May and September;
- *Length of stay*: older visitors were more likely to be on a short stay: 66% of those staying for 1 - 3 nights were aged 45+ years compared with 49% of those who stayed eight nights or longer;
- *Previous visits*: first time visitors to the Highlands were more likely to be younger (47% under 35 years) than those on a repeat visit (19% were under 35 years).

Social Class

As with visitors to the Highlands, those visiting the Ross and Cromarty area were very upmarket in their profile. Around seven in ten visitors to the area were in the ABC1 social classes (69%). Visitors to Wester Ross were more likely to be ABC1's (75%) than those in Easter Ross (64%), mainly a reflection of the larger proportion of overseas visitors in Wester Ross who were generally more likely to be ABC1's: around eight in ten overseas visitors (83%) to the Highlands were in the ABC1 social classes, a much higher proportion than the overall visitor figure for the Highlands (70%).

Figure B-3 - Social Class of visitors to Ross And Cromarty Enterprise area

Base: 405 visitors to Ross & Cromarty area;
3,301 visitors to the Highlands



A definition of social class categories is contained in Appendix 1.

No information is available on the social class of overseas visitors to Scotland from the International Passenger Survey (IPS), however the social class of UK visitors to the Ross and Cromarty area is very similar to that for Scotland as a whole (from the United Kingdom Tourism Survey).

When comparing the market segments with social class, visitors more likely to be **ABC1's** in the Ross and Cromarty area included:

- *Age*: visitors aged 35-54 years (72%)

- *Type of trip*: visitors on touring holidays (74%)
- *Accommodation*: visitors in self-catering units (79%)
- *Origin*: overseas visitors (83%)

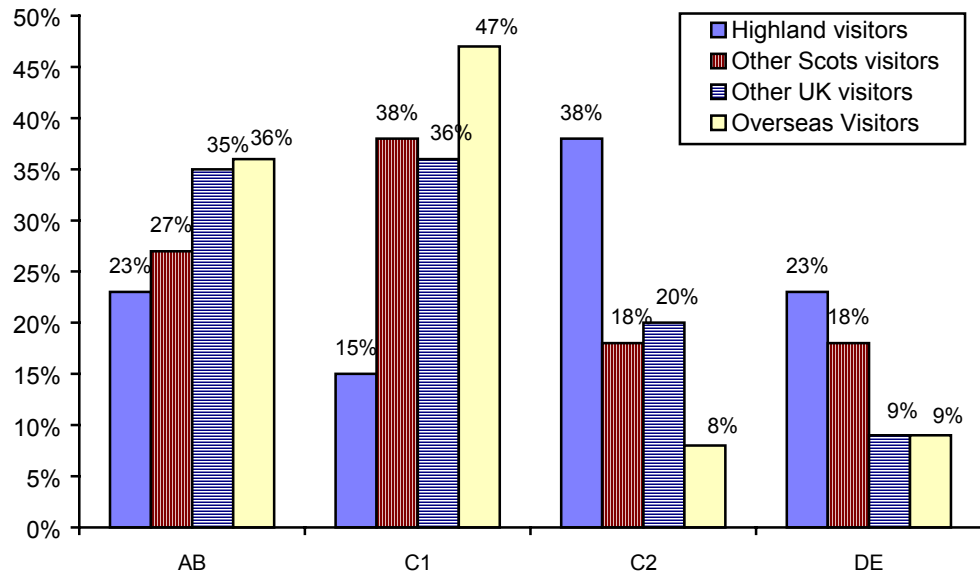
In terms of **C2DE's**, the following segments were more likely to be C2DE's:

- *Age*: visitors aged 35-54 years (72%)
- *Accommodation*: visitors using caravan/camping (37%)

When analysing the social class profile of visitors to the Ross and Cromarty area by region of origin there are some noticeable differences: 83% of overseas visitors were ABC1's, markedly higher than any other visitor grouping.

Figure B-4 - Social Class of visitors by region of origin

Base: 405 visitors to Ross & Cromarty area;



Highland visitors were the least likely group to be ABC1's (38%), compared with 65% of other Scots visitors and 71% of other UK visitors.

Party size and composition

Only 9% of visitors to the Ross and Cromarty area were visiting alone, varying from 7% in Wester Ross to 12% in Easter Ross. Across the area, around six in ten visitors (62%) were with one other person. The average party size amongst visitors to the Ross and Cromarty area was **2.46 people**, a slightly smaller party size when compared with the Highlands as a whole (2.76 people). Visitors to Easter Ross had slightly larger party sizes (2.54) compared with Wester Ross (2.36) although still below the Highlands average of 2.76 people.

Table B-2 - Party Composition in the Ross and Cromarty Enterprise area (%)

Base: 405 visitors to Ross & Cromarty area;
3,301 visitors to the Highlands

	Easter Ross	Wester Ross	Ross and Cromarty	Highlands
Adults, no children under 18 years	76	91	82	79
- one adult, no children under 18 years	12	7	9	7
- two adults, no children under 18 years	54	71	62	56
- more than two adults, no children under 18 years	10	13	11	16
Adults with children under 18 years	23	10	17	21
Total:	100	100	100	100

Overall, only around 17% of visitors to Ross and Cromarty had children with them, a slightly lower proportion than in the Highlands generally (21%). In particular, visitors to Wester Ross were more likely to be travelling without children (91%).

When comparing the market segments with party size and composition there are some noticeable differences:

Party Size:

- *Type of trip:* visitors travelling alone were more likely to be on a touring holiday: 18% of visitors touring were alone compared with 7% on a one-centre holiday;
- *Accommodation:* visitors in larger party sizes were more likely to use 'self-catering' establishments: 12% of visitors using self catering establishments consisted of five or more people compared with 1% using B&B's.

Party Composition:

- *Accommodation:* parties consisting of adults and children under 18 years were more likely to be using self-catering accommodation (36%);

- *Length of stay:* parties consisting of adults and children under 18 years were more likely to be staying 8+ nights (25%) compared with 5% of those staying for 1 - 3 nights.

Origin of Visitors

In terms of the origin of visitors to the Ross and Cromarty Enterprise area, the largest proportion of visitors were from England (42%). Some 36% of visitors originated from Scotland, and the proportion in Easter Ross was slightly higher (40%) than in Wester Ross (32%). In terms of the overseas markets, 19% of visitors originated from outwith the UK, with 13% from Europe and 6% from the rest of the world.

Table B-3 - Origin of Visitors to Ross and Cromarty Enterprise area (%)

Base: 405 visitors to Ross & Cromarty area;
3,301 visitors to the Highlands

	Easter Ross All visitors	Wester Ross All visitors	Ross & Cromarty All visitors	Highlands All visitors
England	42	42	42	39
- South East	11	18	15	13
- North West	10	5	8	6
- Midlands	7	7	7	7
- North	12	9	10	9
- South West	3	3	3	3
Scotland	40	32	36	32
- Glasgow/Clyde Valley	6	6	6	7
- Edinburgh/Lothians	6	7	6	5
- Aberdeen/Grampian	7	5	6	6
- Tayside	6	3	4	2
- Inverness, Loch Ness & Nairn	4	3	3	2
- Fife	2	3	2	2
Other UK	2	4	3	2
Overseas	16	22	19	27
- Germany	5	6	6	5
- USA	2	4	3	5
- Netherlands	1	3	2	2
- France	1	2	1	2
- Canada	1	1	1	2
- Australia	1	1	1	3
- Other overseas	5	5	5	8
Total:	100	100	100	100

Note: * - less than 0.5%

With over a third of all visitors to the RACE area from Scotland (36%), the slightly greater importance of the home markets to this part of the Highlands is evident relative to the Highlands as a whole where under a third of visitors were Scots (32%). Just over four in ten were from elsewhere in the United Kingdom (42%), again a slightly higher proportion to the Highlands generally,

whereas only 19% were from overseas, considerably less than in the Highlands as a whole where over a quarter of visitors were from overseas (27%).

Easter Ross was particularly dependent on the Scots and other UK markets which together accounted for 84% of visitors to the area. Wester Ross on the other hand was rather more similar to the other parts of the Highlands, with a higher proportion of overseas visitors (22%) and 32% from Scotland.

The main population centre of the South East of England was the biggest regional market for Ross and Cromarty as a whole (15%), although for Easter Ross, the North of England was a slightly bigger market (12%) than the South East (11%). Amongst Scots, the main population centres of Glasgow (6%), Edinburgh (6%) and Aberdeen and the Grampians (6%) were the biggest markets. In terms of overseas markets, Germany and the United States of America were the two key markets for this area, with 6% and 3% respectively of visitors coming from each of these countries.

By concentrating primarily on overnight holiday visitors to the area, it is possible to compare the profile of visitors to Ross and Cromarty with the typical origin profile for Scotland as a whole (from UKTS and IPS). Typically, English residents account for around 40% of holidays in Scotland, a similar proportion are Scots, 3% are from Wales and Northern Ireland, and the remaining 15% are from overseas. The equivalent proportions of holiday visitors to Ross and Cromarty were as follows:

- Scots holiday visitors: 31%
- English holiday visitors: 44%
- Other UK holiday visitors: 3%
- Overseas holiday visitors: 22%

Although it must be borne in mind that the Highland Visitors Survey only covered the May to October period as opposed to the full-year coverage of IPS and UKTS, it would appear that although Ross and Cromarty was rather less dependent on the overseas market than the rest of the Highlands, it received a higher proportion of this market than Scotland as a whole.

Motivations for visiting

Main reasons for visiting the Highlands

In order to establish their reasons for visiting the Highlands, visitors were asked to indicate their main reasons for doing so. Unprompted, a wide variety of answers were given, with responses from 4% or more of respondents shown below.

Table B-4 - Main reasons for visiting the Highlands (%)

Base: 405 visitors to Ross & Cromarty area;
3,301 visitors to the Highlands

	Easter Ross	Wester Ross	Ross & Cromarty	Highlands
Scenery/scenic views/beauty/unspoilt	19	33	25	22
Been before/knew area	20	24	22	18
Peace and quiet/tranquillity/relaxing/remote	11	30	20	13
Family/friends/connections in the area	20	7	14	12
General sightseeing/day out	15	11	13	13
Like area/enjoy it	14	9	12	12
Mountains and hills/landscape	8	16	12	12
Never been before/always wanted to come	12	8	10	14
Wildlife/nature/flora and fauna	6	10	8	6
Walks/walking opportunities	5	8	6	6
Personal business/house here/timeshare	5	3	4	6
Because of the people/friendly people	4	5	4	4
Total:	221	184	405	100

The majority of reasons given by visitors centred around the Highland's scenery, with a quarter of visitors to Ross and Cromarty (25%) citing the scenery as being one of the main reasons for choosing to visit the Highlands.

Around two in ten visitors to the RACE area (22%) indicated that they were basing their visit around a previous visit and generally knowing the area.

In terms of the two Ross and Cromarty areas, there are some significant differences in their motivations to visit:

- 33% of visitors in Wester Ross were visiting because of the scenery compared with 19% of visitors in Easter Ross;
- on a similar theme 16% of visitors to Wester Ross mentioned the mountains and hills compared with 8% of those visiting Easter Ross;

- 30% of visitors in Wester Ross were visiting for ‘peace and quiet’ compared with 11% of visitors in Easter Ross
- 20% of visitors in Easter Ross were visiting due to family and/or friend connections whilst only 7% of visitors to Wester Ross were visiting for this reason.

As would be expected there were variations between the reasons for visiting amongst the key market sectors:

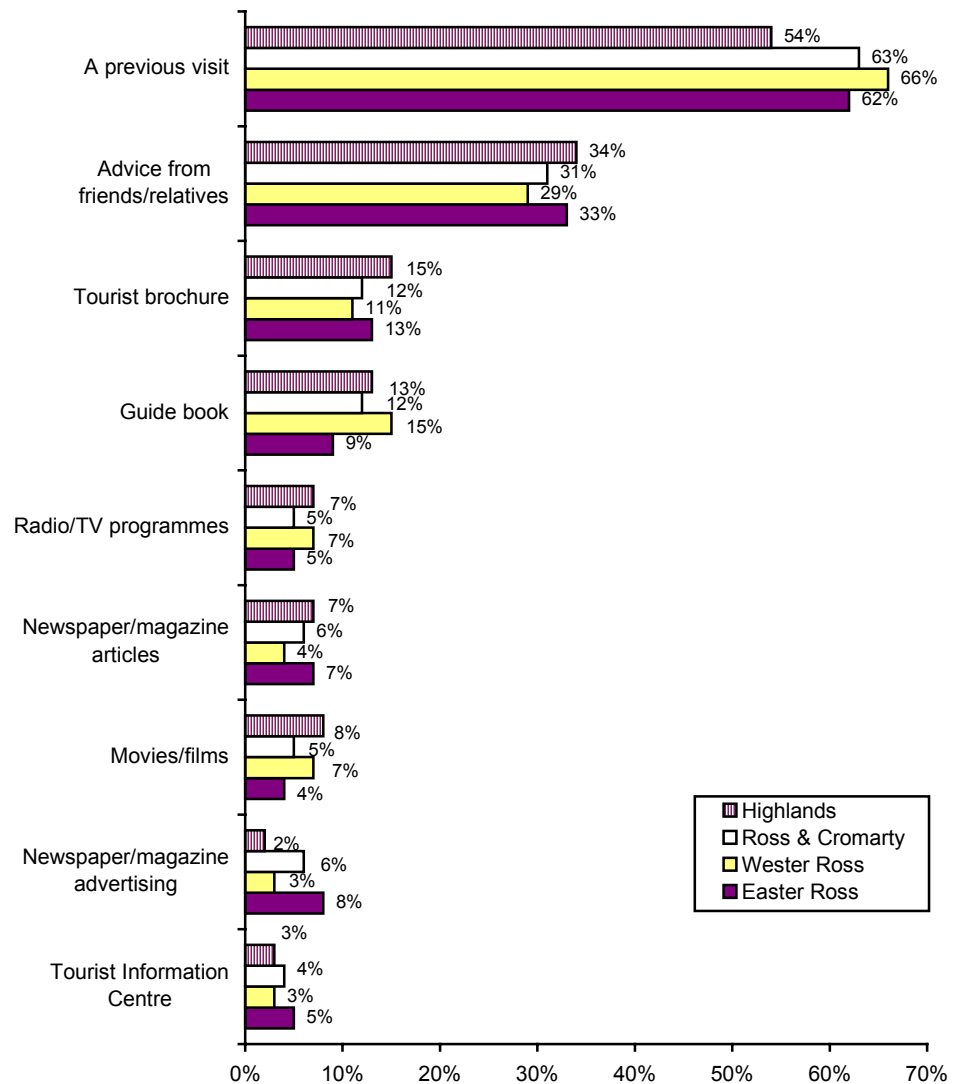
- *Scenery (25% overall)*: the scenery was more important for visitors on a touring holiday (33%), visitors aged 15-34 years, visitors staying in bed and breakfasts (33%) and caravan/tents (34%) and overseas visitors (33%);
- *Never been before/always wanted to come (10% overall)*: more important for overseas visitors (18%), visitors aged 15-34 years (15%), ABC1's (12%);
- *Been before/know area (22% overall)*: more important for visitors aged 55+ years, ABC1's (23%), those staying in hotels and guesthouses (35%) and visitors from outwith Scotland but from the rest of the UK (28%);
- *Peace & quiet/relaxing/tranquillity/remote (20% overall)*: more important for visitors aged 35-54 years, those on a touring holiday (28%), visitors in caravans/camping (26%).

Marketing Influences

In order to establish the impact of various marketing activities, respondents were shown a list of items and asked which, if any, had influenced their decision to visit the Highlands. Responses from 4% or more of respondents are shown below.

Figure B-5 - Influences on the decision to visit the Highlands (%)

Base: 405 visitors to Ross & Cromarty area;
3,301 visitors to the Highlands



As in other parts of the Highlands, informal influences are more important than the more formal sources of information (brochures, guidebooks etc.) Encouragingly, around six in ten visitors to the Ross and Cromarty area were influenced by a previous visit (63%). This suggests that the Highlands are offering a satisfactory 'product' to encourage so many visitors to return on

repeat visits. A further 31% were influenced to visit following advice from friends and relatives. Tourist brochures and guide books both influenced around 12% of visitors respectively.

Interestingly, visitors in the Ross & Cromarty Enterprise area were more likely to be relying on a previous visit (63%) as an influence than the average amongst visitors interviewed throughout the Highlands area (54%).

When comparing the origin of visitors with the four main influencing factors there are some interesting variations:

- visitors from outwith Scotland but within the UK were more likely to rely on a previous visit as an influence (77%) compared with 21% of overseas visitors;
- 50% of overseas visitors relied on advice from friends and relatives compared with 21% of Scots visitors and 31% of visitors from the rest of the UK;
- overseas visitors were more likely to be influenced by tourist brochures and guidebooks than any other visitors (58% compared with 16% of other visitors).

When comparing the influences on the trip amongst Scots, other UK and overseas visitors there are some interesting variations. The top five influencing factors for each of these markets is indicated below:

Scots visitors:

Previous visit	- 68%
Advice - friends/relatives	- 21%
Tourist brochure(s)	- 6%
Guidebook	- 5%
Newspaper/mag. articles	- 3%

Overseas visitors:

Advice - friends/relatives	- 50%
Guidebook	- 36%
Tourist brochure(s)	- 22%
Previous visit	- 21%
Newspaper/mag. articles	- 11%

Other UK visitors:

Previous visit	- 77%
Advice - friends/relatives	- 31%
Tourist brochure(s)	- 13%
Guidebook	- 7%
Newspaper/mag. articles	- 6%

Use of tourist brochures

Tourist brochures and guidebooks each influenced around 12% of visitors. Not surprisingly, tourist brochures had a higher success rate according to different market types:

- tourist brochures were more popular amongst visitors using self-catering accommodation (19%) compared to 10% using hotels and guesthouses;
- tourist brochures influenced 22% of overseas visitors compared with 6% of Scots visitors;
- 22% of visitors on their first trip to the Highlands had been influenced by brochures as opposed to 10% of repeat visitors.

These respondents were then shown the front covers of several tourist brochures produced by the Scottish Tourist Board and Highlands of Scotland Tourist Board, and asked whether any of them had influenced their visit.

Table B-5 - Brochures which had influenced the visit (%)

Base: 49 respondents in the Ross & Cromarty area, influenced by brochure(s)
507 respondents in the Highlands, influenced by brochure(s)

	Ross & Cromarty	Highlands
Freedom of the Highlands (HOST)	22	32
Scotland - Main UK Guide (STB)	29	31
Scotland - Overseas Guide (STB)	29	31
6 Local Accommodation/ Visitor	20	14
Guides (HOST)	29	39
None of these	100	100
Total:		

Note - care should be taken when interpreting this table as a result of the small sample size (n=49)

The two brochures which appeared to have made the most impact in influencing visitors were the STB brochures each being selected by 29% of visitors. Interestingly, around three in ten visitors (29%) had not been influenced by any of these brochures, a slightly smaller proportion than visitors interviewed in the rest of the Highlands (39%).

Length of Stay

Visitors staying away from home were asked to indicate how many nights they would be spending in Scotland, in the Highlands and in the Ross and Cromarty area.

Table B-6 - Length of Stay (%)

Base: 386 respondents in the Ross & Cromarty area staying away from home
3,080 respondents in the Highlands staying away from home

	Ross & Cromarty area			Highlands		
	In Scotland	In the Highlands	In the area	In Scotland	In the Highlands	In the area
None	-	-	28	-	5	22
One	1	2	9	2	4	14
Two	4	5	12	5	9	16
Three	6	8	10	7	10	11
Four	7	10	7	7	9	7
Five	5	9	4	5	8	5
Six	8	10	6	7	8	4
Seven	17	22	13	19	19	11
Eight - Thirteen	17	17	5	20	15	4
Fourteen	17	10	3	15	8	4
Fifteen or more	18	7	3	14	5	2
Total:	100	100	100	100	100	100
Average	10.4 nights	7.9 nights	4.0 nights	10.0 nights	7.0 nights	3.9 nights

Visitors interviewed in the Ross and Cromarty area were typically spending 10.4 nights in Scotland, 7.9 nights in the Highlands and 4.0 nights in the Ross and Cromarty area. These lengths of stay are slightly longer than for the average for tourists in the Highlands, undoubtedly a reflection of the northerly location of the RACE area and the resulting longer travel time.

There were some significant variations in the lengths of stay recorded by visitors interviewed in the Easter Ross and Wester Ross areas:

	In Scotland	In the Highlands	In the area
Easter Ross	9.9 nights	7.8 nights	3.9 nights
Wester Ross	10.9 nights	8.1 nights	4.1 nights
Ross & Cromarty	10.4 nights	7.9 nights	4.0 nights
Highlands	10.0 nights	7.0 nights	3.9 nights

Visitors interviewed in the Wester Ross area were more likely to be staying slightly longer than their counterparts interviewed in Easter Ross: the former stayed 10.9, 8.1 and 4.1 nights respectively in Scotland, the Highlands, and the local area. Visitors to Easter Ross on the other hand stayed for 9.9 nights, 7.8 nights and 3.9 nights respectively.

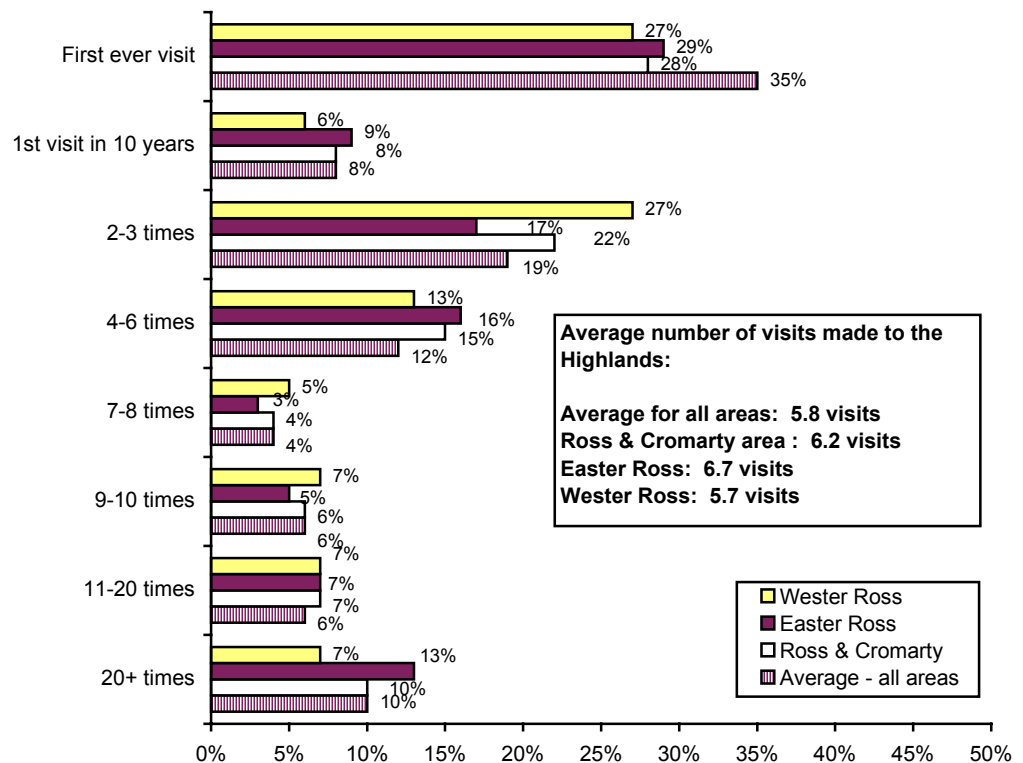
Previous Visits

Previous visits to the Highlands

Around three in ten visitors (28%) to the Ross & Cromarty Enterprise area were on their first visit to the Highlands, a lower proportion than the average for the Highlands as a whole (35%). This suggests that amongst RACE visitors in particular, the Highlands area has a loyal core of repeat visitors (72%) who have been to the Highlands many times before, in some instance more than twenty times (10%).

Figure B-6 - Number of visits to the Highlands (including this one)

Base: 382 non-Highland residents in the Ross & Cromarty area
3,120 non-Highland residents in the Highlands



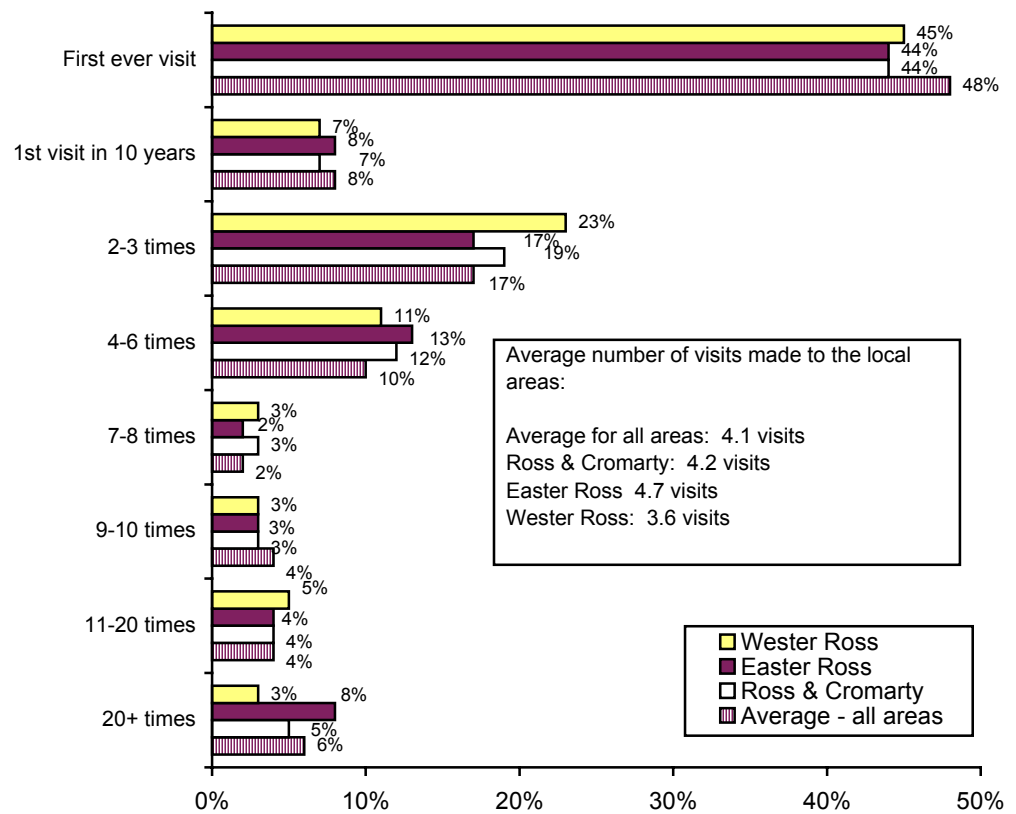
Not surprisingly, the number of previous visits was very much dependent on visitors' ages: visitors aged under 35 years were more likely to be on their first visit (48%) to the Highlands as opposed to 17% of visitors aged 55+ years. The types of trips undertaken was also an influencing factor with visitors on touring holidays more likely to be on their first visit (46%). Overseas visitors were particularly likely to be on their first visit (72%) reflecting the geographical distances involved.

Previous visits to Ross And Cromarty Enterprise area

Just over four in every ten visitors (44%) indicated they were on their first visit to the Ross and Cromarty area. This is a similar proportion of first-time visitors as for the average for the Highlands (48%).

Figure B-7 - Number of visits to Ross and Cromarty (including this one)

Base: 382 non-Highland residents in the Ross & Cromarty area
3,120 non-Highland residents in the Highlands



Not surprisingly, likelihood to have visited Ross and Cromarty together with the frequency of these visits increases with age: 40% of visitors aged 55+ years had visited the Ross and Cromarty area between two and six times as opposed to 26% of visitors aged under 35 years.

Overall the average number of previous visits to Ross and Cromarty is **4.2**, a similar proportion to other local areas. Previous visits to Wester Ross however were significantly lower (3.6 times) than Easter Ross (4.7 previous visits).

Visits to other parts of the Highlands

Visitors were then asked to indicate which other parts of the Highlands they would be visiting as well as areas where they would be staying overnight.

Table B-7 - Areas Visited/Stayed in by visitors to Ross & Cromarty Enterprise area (%)

Base: 405 visitors to Ross & Cromarty area (visiting);

386 visitors to Ross & Cromarty area, staying overnight in Highlands

	Areas visited	Areas Stayed in
Caithness	21	10
Sutherland	34	18
Wester Ross	69	47
Easter Ross	67	37
Inverness, Loch Ness and Nairn	62	28
Moray	15	3
Badenoch and Strathspey	19	3
Isle of Skye and Lochalsh	34	18
Lochaber	29	15
Orkney	5	2
Western Isles	1	1
Total	100	100

Not surprisingly, visitors interviewed in the Ross and Cromarty Enterprise area were more likely to be visiting the geographical areas closest to Ross and Cromarty during their trip to the Highlands: 55% of visitors indicated they would be visiting Caithness & Sutherland whilst 62% said they would be visiting Inverness, Loch Ness and Nairn. Areas to the south of Inverness were less likely to be visited: only 19% were visiting Badenoch and Strathspey and 15% were visiting Moray. Some 84% of visitors in the Ross and Cromarty area were staying locally (47% Wester Ross and 37% Easter Ross). Some market segments were more likely to be staying overnight in the Ross and Cromarty area than others:

- *Age*: visitors aged under 35 years (94%)
- *Accommodation*: visitors staying in bed and breakfasts and caravans/camping (92% each).

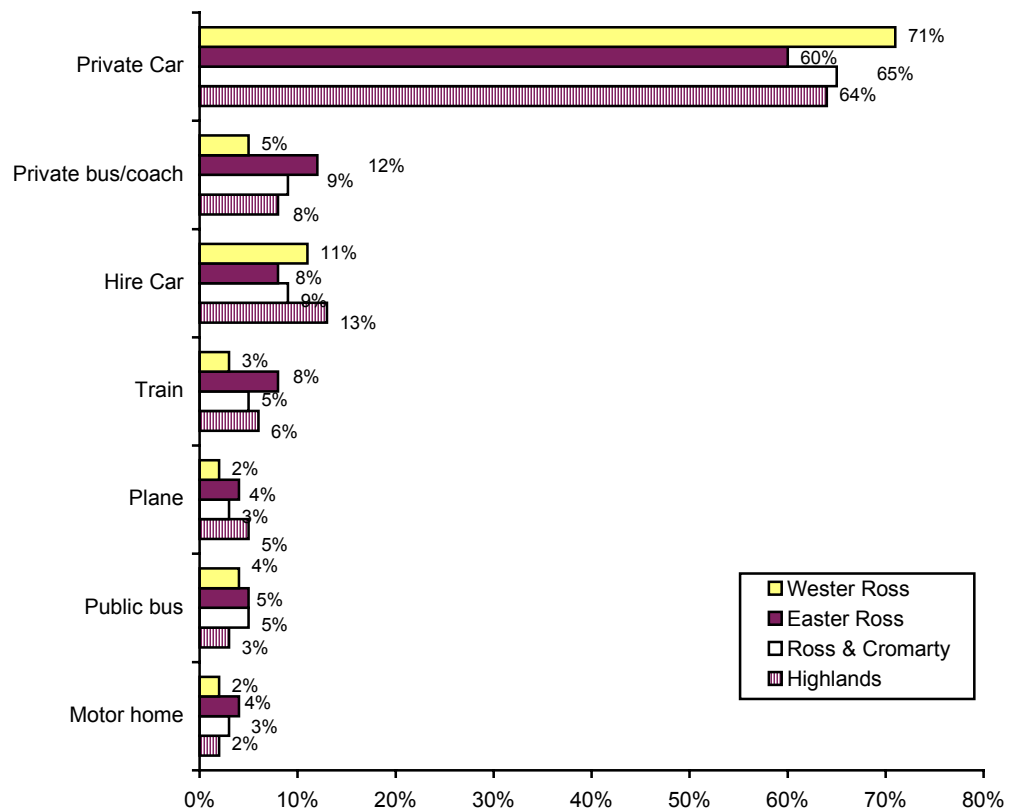
The Inverness, Loch Ness and Nairn area together with Caithness and Sutherland were other popular overnight areas amongst visitors to Ross and Cromarty: in each case, 28% of visitors were staying overnight in these areas.

Transport Used

The main form of transport used by visitors on their journey to the **Highlands** was their own car (65%). Hire cars and private buses/coaches were popular amongst around one in ten visitors (9%).

Figure B-8 - Forms of Transport used to get to the Highlands

Base: 382 visitors to Ross & Cromarty, non-resident in the Highlands
3,120 visitors to the Highlands



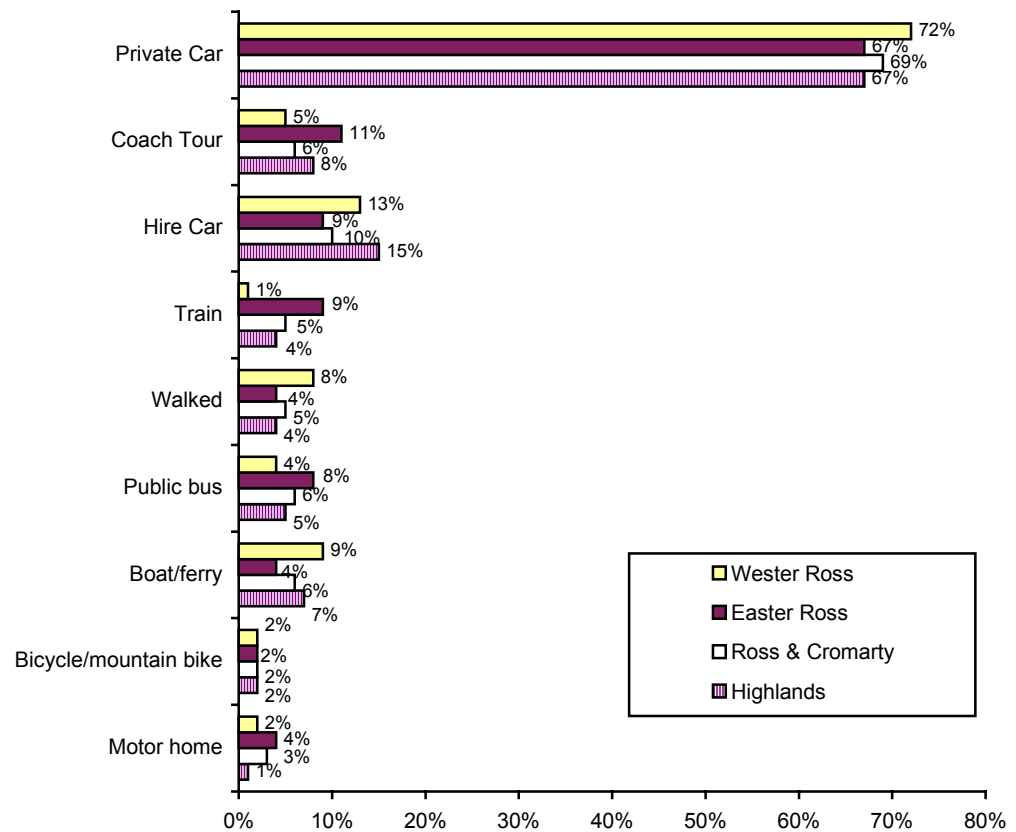
When comparing forms of transport used amongst the key market segments, there are some noticeable differences:

- *Origin:* hired cars were more popular amongst overseas visitors (33%) whilst Scots visitors were more likely to use their own car (79%);
- *Age:* visitors under 35 years were more likely to use rental cars (16%), public buses (10%) and trains (9%);
- *Accommodation:* visitors staying in self-catering accommodation were more likely to use their own cars (91%);

Around seven in ten visitors (69%) indicated that they used their own car **whilst in the Highlands**, with a further 10% using a hire car. No other forms of transport were used by more than 10% of visitors to the Highlands.

Figure B-9 - Forms of Transport used whilst in the Highlands

Base: 405 visitors to Ross & Cromarty area
3,301 visitors to the Highlands



Visitors to the Ross and Cromarty area were less likely to be using hire cars (10%) when compared with visitors interviewed in the rest of the Highlands (15%). In terms of Wester Ross and Easter Ross there are some slight differences between the types of transport used: visitors in Wester Ross were more likely to use private cars (72%), hire cars (13%) and boats/ferries (9%) whilst visitors in Easter Ross were more likely to be on coach tours (11%), using trains (9%) (a reflection of the rail networks), or public buses (8%).

Accommodation

Accommodation used in the Highlands

Visitors who indicated they were staying overnight in the Highlands were asked what types of accommodation they were using during their visit. The three most popular forms of accommodation used by visitors interviewed in the Ross and Cromarty Enterprise area were:

- hotels and motels (25%)
- bed and breakfasts (23%)
- self-catering flats, houses and cottages (20%)

Table B-8 - Accommodation used in the Highlands (%)

Base: 386 visitors to Ross & Cromarty area, staying overnight in Highlands
2,936 visitors to the Highlands staying overnight in the Highlands

	Easter Ross	Wester Ross	Ross & Cromarty	Highlands
Hotel/motel	26	24	25	25
Bed and Breakfast	20	25	23	28
Rented house/flat/cottage	18	22	20	15
Tent	8	19	13	11
Staying with friends and relatives	18	4	11	9
Youth Hostel	5	9	7	6
Touring caravan	4	7	6	5
Static caravan - rented	5	2	4	4
Guest house	3	4	3	5
Total:	100	100	100	100

Note - (*) - less than 1%

Visitors to Wester Ross were rather more likely to stay in tents (19%), bed and breakfast establishments (25%) or in self-catering accommodation (22%) than their counterparts in Easter Ross (8%, 20% and 18% respectively). Conversely, visitors to Easter Ross were significantly more likely to be staying with friends and relatives (18%).

When comparing the types of accommodation used with the market segments, not surprisingly there are some interesting variations:

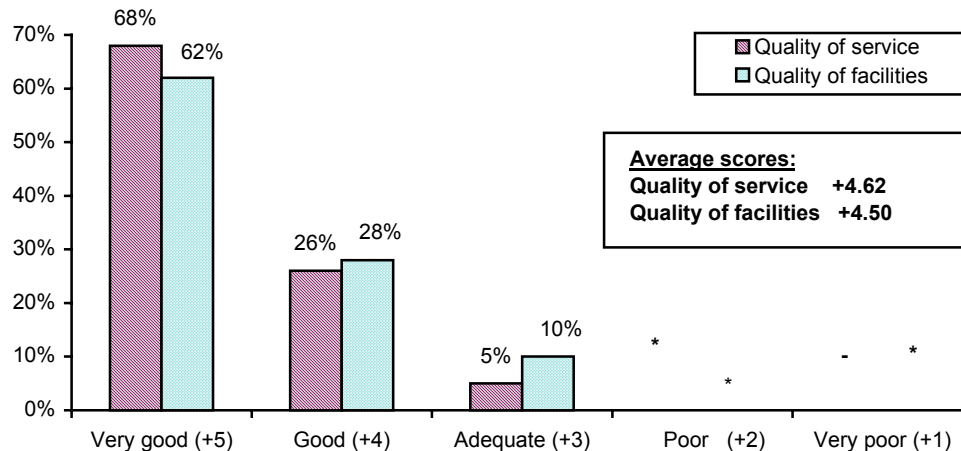
- *Age*: visitors aged 55+ years were more likely to be staying in hotels/motels (45%) whilst visitors under 35 years were more likely to be staying in tents (35%), bed and breakfasts (29%) and youth hostels (17%);
- *Social Class*: C2DE's were more likely to be staying with friends and relatives (16%) whilst ABC1's were more likely to be staying in bed and breakfasts (24%) and self-catering flats/houses/cottages (22%);
- *Type of trip*: visitors on a touring holiday were more likely to be staying in B&Bs (43%) and less likely to be using hotels (13%). Visitors on one centre holidays were more likely to be using self-catering units (29%);
- *Origin*: visitors from Scotland were more likely to use hotels/motels (33%) whilst overseas visitors were more likely to use bed and breakfasts (49%). Visitors from the rest of the UK were more likely to use self-catering accommodation (26%).

Levels of satisfaction with accommodation

Visitors who were interviewed in the Ross and Cromarty Enterprise area and who indicated they were staying in commercial accommodation were asked to rate the quality of service and facilities experienced at their accommodation:

Figure B-10 - Rating of accommodation used

Base: 310 visitors to Ross & Cromarty area staying in commercial accommodation



Note: (-) - nil respondents : (*) - less than 1%

Encouragingly, visitors rated the service and facilities highly: 90% of visitors rated their accommodation facilities as 'very good or good' whilst a slightly higher proportion rated service as 'very good or good' (94%).

By applying 'scores' from +5 (very good) to +1 (very poor), it is possible to obtain an index of satisfaction for the service and facilities experienced in Highland accommodation. Overall, the quality of service achieved a slightly higher score (+4.62) than the quality of facilities (+4.50).

In terms of the quality of service, visitors aged 55+ years were more likely to rate the service higher (75%) whilst touring visitors were more likely to rate the service as being adequate (9%). Similar results occurred with the quality of facilities, with 75% of visitors aged 55+ years rating the facilities as 'very good' whilst 13% of touring visitors rated the facilities as being 'adequate'. The ratings received from touring visitors may reflect their ability to compare more readily different types of accommodation being used during their visit to the Highlands as opposed to visitors on one centre holidays.

Activities Undertaken

In order to establish the types of activities undertaken by visitors during their trip in the Highlands, visitors were shown a list of activities and asked to indicate which, if any, they had undertaken. Following on from this, visitors were then asked to indicate their main activity. The activities mentioned by 2% or more of visitors interviewed in the Ross and Cromarty area are shown below.

Table B-9a - Activities undertaken whilst visiting the Highlands (%)

Base: 405 visitors to Ross & Cromarty area
3,301 visitors to the Highlands

	Easter Ross	Wester Ross	Ross & Cromarty	Highlands
Any Sporting activities	49	68	58	59
Low level walking of 2-8 miles	33	51	41	47
Hill walking/low level walks >8 miles	11	21	15	11
Cycling/mountain biking	5	9	7	8
Mountaineering/rock climbing	4	10	6	4
Game Fishing	5	5	5	5
Golf	6	4	5	6
Sea Angling	3	4	3	2
Sailing	3	4	3	2
No sporting activities	51	32	42	41
Any non-sporting activities	97	98	97	98
General sightseeing/touring	92	92	92	91
Shopping	44	53	48	58
Museum/art gallery/heritage centre	27	40	33	42
Wildlife attraction	19	30	24	25
Archaeological site	10	20	14	17
Leisure centre/swimming pool	15	11	13	14
Concert/ceilidh/theatre/cinema	8	13	10	11
Go to other local event	4	4	4	6
Go to other cultural event	3	2	2	5
Birdwatching/field & nature studies	1	3	2	1
No non-sporting activities	3	2	3	2

Almost all of the visitors had taken part in 'non-sporting' activities during their visit to the Highlands (97%) as opposed to 58% taking part in 'sporting activities'. The three most popular non-sporting and sporting activities are highlighted as follows:

Non-sporting activities

- General sightseeing/touring (92%)
- Shopping (48%)
- Going to a museum/art gallery/heritage centre (33%)

Sporting activities

- Low level walking/rambling (41%)
- Hill walking 8+ miles (15%)
- Cycling/mountain biking (7%)

There were variations amongst the market sectors as to the types of activities undertaken:

- *General sightseeing/touring (92% overall):* more popular amongst visitors under 35 years (96%), visitors on touring holidays (97%), visitors staying in bed and breakfasts (98%);
- *Shopping (48% overall):* more popular amongst C2DE's (57%), visitors on a one centre holiday (53%), visitors staying 8+ nights (59%);
- *Visits to Museum etc. (33% overall):* more popular amongst ABC1's (36%), visitors touring (42%), overseas visitors (42%);
- *Low level walking of 2 - 8 miles (41% overall):* visitors under 35 years (55%), ABC1's (46%), touring visitors (57%);
- *Hill walking (15% overall):* visitors in self-catering accommodation (27%), staying 8+ nights (22%);
- *Cycling/mountainbiking (7% overall):* visitors under 35 years (13%), touring visitors (14%).

On being asked to isolate the main activity undertaken during their visit to the Highlands, visitors interviewed in the Ross and Cromarty Enterprise area centred their main activities around 'non-sporting' activities. Seven in ten visitors (70%) indicated that their main activity was 'general sightseeing/touring'. In terms of sporting activities, two in ten visitors indicated their main activity would be sporting in nature, with the main activity being walking (15%).

The four key activities mentioned by visitors were as follows:

- general sightseeing/touring (70%)
- low level walking/rambling (2-8 miles) (9%)
- hill walking (more than 8 miles) (6%)
- mountaineering/rock climbing (3%)

Table B-9b - Activities undertaken as MAIN ACTIVITY in the Highlands (%)

Base: 405 visitors to Ross & Cromarty area
3,301 visitors to the Highlands

	Easter Ross	Wester Ross	Ross & Cromarty	Highlands
Any Sporting activities	15	27	20	17
Low level walking/rambling of 2-8 miles	6	12	9	8
Hill walking/low level walks >8 miles	4	9	6	3
Mountaineering/rock climbing	2	4	3	1
No sporting activities	85	73	80	83
Any non-sporting activities	81	73	77	82
General sightseeing/touring	71	68	70	75
Go to an archaeological site	*	1	1	1
Shopping	3	-	1	2
No non-sporting activities	19	27	23	18
Total:	100	100	100	100

In comparison with the Highlands as a whole visitors interviewed in the Ross and Cromarty area were slightly more likely to take part in sporting activities (20%) than in the rest of the Highlands (17%). However visitors were less likely to take part in non-sporting activities as their main activity (77%) compared with the Highlands (82%). There were significant variations between Wester Ross and Easter Ross however: over a quarter of visitors to Wester Ross were on a sporting (activity) holiday (27%), compared to less than a fifth of Easter Ross visitors (15%).

Attractions visited and levels of satisfaction

Attractions visited

Visitors interviewed in the Ross and Cromarty area were shown a list of attractions and facilities and asked to indicate which ones they had visited or were planning to visit during their trip to the Ross and Cromarty area. Attractions mentioned by 2% or more of visitors are shown below.

Table B-10 - Attractions visited in Ross and Cromarty area (%)

Base: 405 visitors to Ross & Cromarty area

	Easter Ross	Wester Ross	Ross & Cromarty
Inverewe Gardens, Gairloch (*)	11	40	24
Gairloch Heritage Museum, Gairloch	5	15	10
Ullapool Museum	7	14	10
Cromarty Courthouse (*)	15	2	9
Highland Museum of Childhood, Strathpeffer	13	4	9
Dolphin Interpretive Centre, North Kessock	10	5	8
Torridon Countryside Centre, near Kinlochewe	2	15	8
Inverpolly Nature Reserve Visitor Centre	*	14	7
Black Isle Country Park, North Kessock	9	3	6
Glen Ord Distillery Visitor Centre, Muir of Ord	9	4	6
Hydroponicum, Achiltibuie	4	7	5
Glenmorangie Visitor Centre, Tain	6	4	5
Hugh Miller's Cottage, Cromarty	9	1	5
Tain Through Time, Tain	5	1	3
Groam House Museum	5	1	3
Red Kite Remote Viewing, North Kessock	3	2	2
Aultroy Visitor Centre, Kinlochewe	-	4	2
None of these	48	31	40
Total	100	100	100

(*) - Interview locations. * - less than 1%

It is worth noting that two of the attractions listed above were interview locations marked with an asterisk (*) and hence the visitation levels may have been slightly inflated.

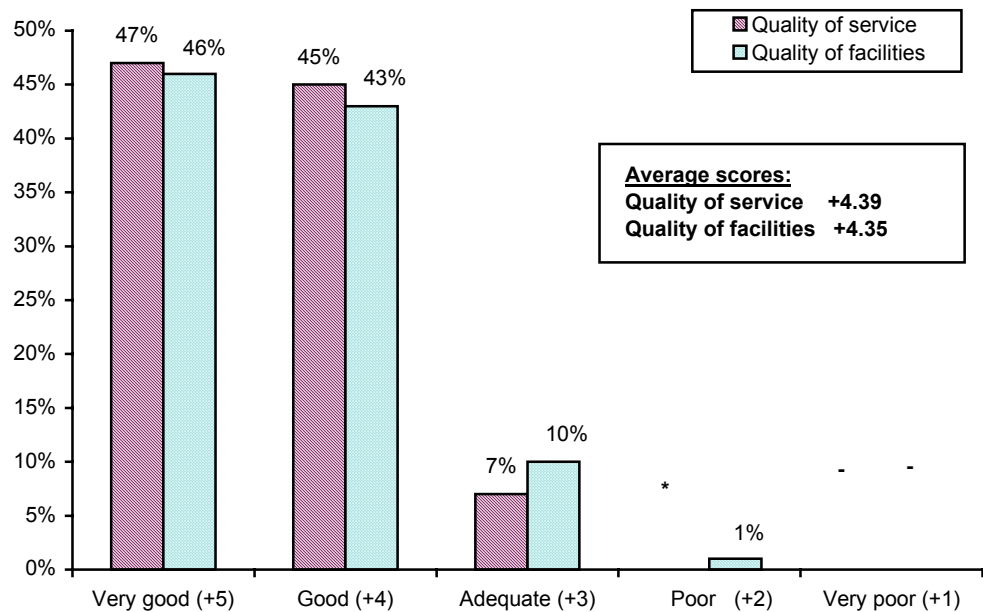
The three most popular attractions were as follows:

- *Inverewe Gardens, Gairloch (24% overall)*: more popular amongst visitors aged between 35-54 years, ABC1's (29%), visitors staying in hotels and guesthouses (31%) and visitors from outwith Scotland but within the rest of the UK (26%);
- *Gairloch Heritage Museum (10% overall)*: ABC1's (12%), and visitors staying in self-catering accommodation (21%);
- *Ullapool Museum (10% overall)*: ABC1's (11%), visitors on touring holidays (13%) and those staying eight or more nights (13%).

Levels of satisfaction with attractions

Visitors interviewed in the Ross and Cromarty Enterprise area were asked to rate the quality of the service and facilities at the attractions they visited on their trip in the Highlands. It is worth noting that a number of visitors had not visited any attractions at the time of being interviewed.

Figure B-11 - Rating of attractions by visitors to Ross and Cromarty Enterprise area (%)
Base: 235 visitors to Ross & Cromarty area who visited attractions



Note: (-) nil respondents (*) - less than 1%

Overall satisfaction levels with the visitor attractions were generally high, with around nine in ten visitors rating both the service and facilities as 'very good or good' (92% and 89% respectively).

As with accommodation, by applying "scores" from +5 (Very good) to +1 (Very poor), it is possible to obtain an index of satisfaction for the service and facilities experienced in Highland visitor attractions. Overall, there were no significant differences between the two:

- quality of service - 4.39
- quality of facilities - 4.35

Use of Tourist Information Centres and levels of satisfaction

Visits to Tourist Information Centres in the Highlands

Six in ten visitors interviewed in the Ross and Cromarty area had already visited a Tourist Information Centre (TIC) during their visit to the Highlands (60%). This is a slightly higher proportion than that for the Highlands as a whole (56%).

The market segments most likely to have visited a TIC are shown as follows:

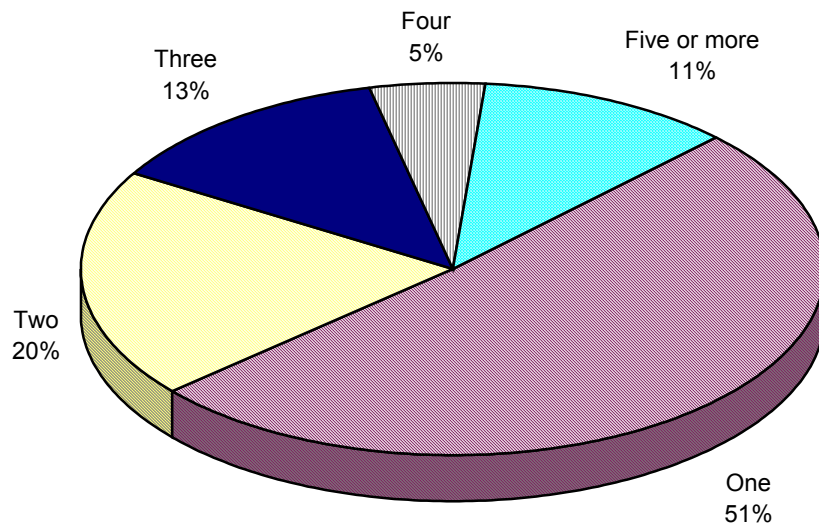
- *Age*: visitors aged under 35 years (70%)
- *Social Class*: visitors in the ABC1 social classes (66%)
- *Type of trip*: visitors on touring holidays (86%)
- *Accommodation*: visitors in bed and breakfasts (79%)
- *Origin*: overseas visitors (88%)

The 40% of visitors who had not yet visited a TIC during their trip were asked whether they were planning to visit one. Fifteen per cent of visitors indicated they intended to visit whereas around eight in ten visitors (81%) had no intention of visiting. In total therefore, 66% of visitors had visited or intended to visit a TIC during their visit to the Highlands.

Those who had visited on their trip were asked to indicate how many times they had visited. Over half the visitors (51%) had made one visit with a further 20% having made two visits. Visitors more likely to make more than one visit during their visit in the Highlands were visitors on touring holidays: 62% indicated they had made two or more visits compared with 38% of visitors on one centre holidays.

Figure B-12 - Number of visits to Highland TICs

Base: 241 visitors in RACE area who visited a TIC

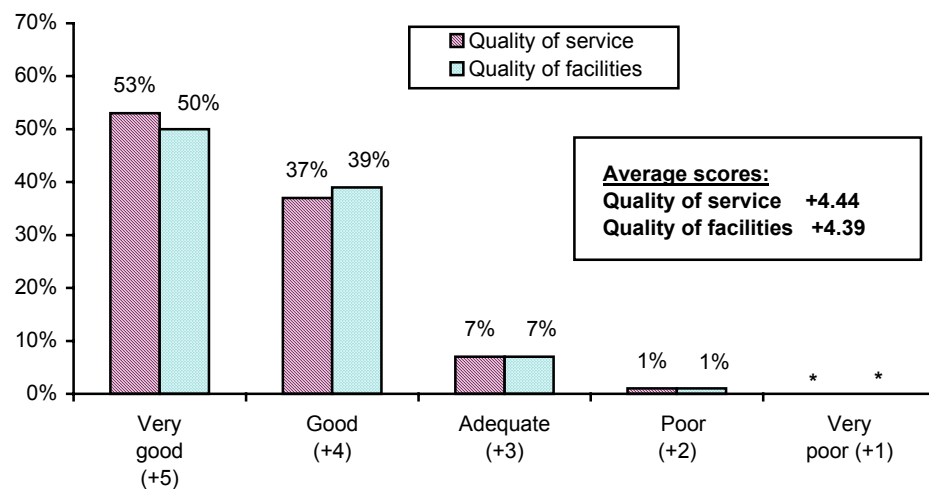


Levels of satisfaction with Tourist Information Centres

Visitors interviewed in the Ross and Cromarty area who had already visited a TIC on their trip (n=241) were asked to rate the quality of service and facilities they had experienced in the Highland TICs.

Figure B-13 - Rating of TICs by visitors to Ross and Cromarty Enterprise area (%)

Base: 241 visitors to Ross & Cromarty area who had used TICs



Note: (*) - less than 1%

Amongst those respondents who had used TICs in the Highlands, levels of satisfaction with both the quality of service and the quality of facilities was high: in each case, around half described them as “very good” (53% and 50% respectively), and around two in five (37% and 39%) described them as good. Encouragingly, only 1% of TIC visitors (n=2) described the service received as “poor” and likewise only 1% described the facilities on offer as “poor” (n=3).

As with accommodation and visitor attractions, by applying “scores” from +5 (Very good) to +1 (Very poor), it is possible to obtain an index of satisfaction for the service and facilities experienced in Highland TICs. Overall, the quality of service and the quality of facilities obtained very similar satisfaction scores of +4.44 and +4.39 respectively.

Levels of satisfaction with shops, pubs and restaurants

In addition to levels of satisfaction with the quality of service obtained in their accommodation, attractions visited, and TICs as described in previous sections, respondents were also asked to rate the service and facilities in pubs and restaurants and in shops in the Highlands:

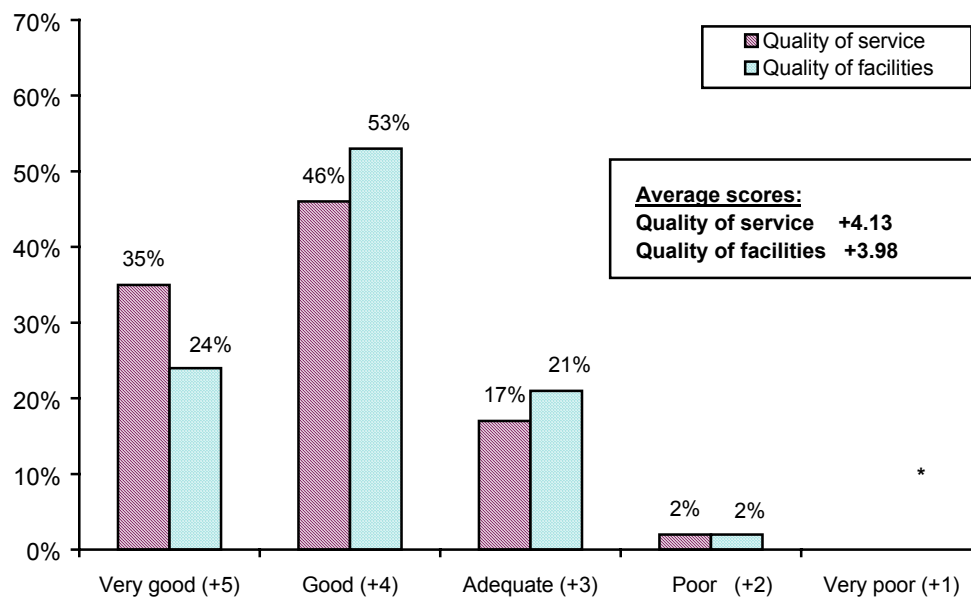
Ratings of Shops

Encouragingly, 46% of visitors indicated that they had received 'good' service in shops within the Highlands, with a further 35% indicating that the service was 'very good'. In terms of the quality of facilities, as with service, the balance was rather more towards "good" (53%) than "very good" (24%).

When comparing the average scores, the service within shops was rated more highly (+4.13) than the facilities which received a rating of +3.98.

Figure B-14 - Rating of shops by visitors to Ross and Cromarty Enterprise area (%)

Base: all visitors to Ross & Cromarty area who visited shops



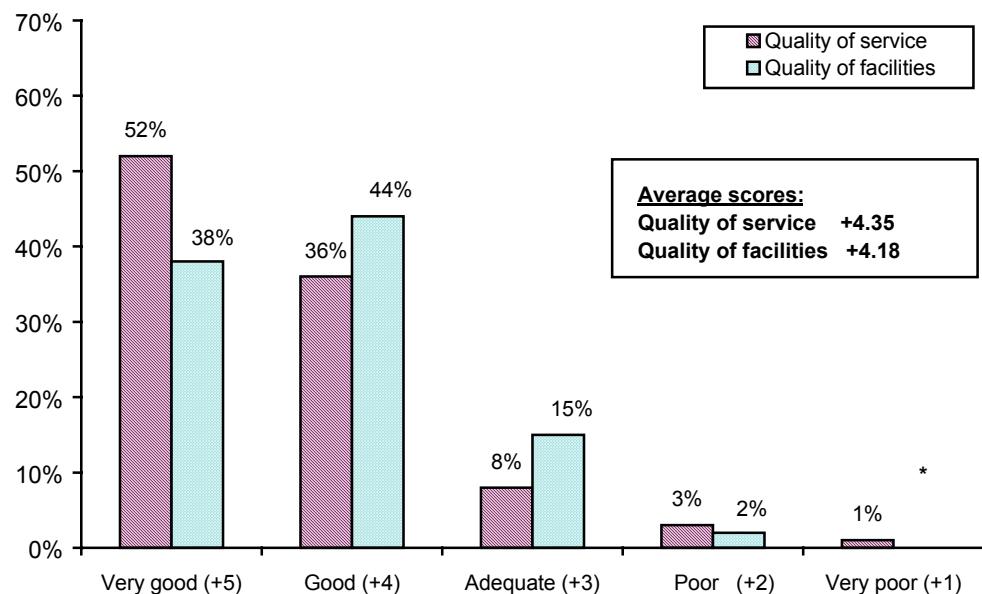
Note: (*) - less than 1%

Pubs and Restaurants

In terms of the quality of service experienced in pubs and restaurants, visitors responses erred more towards 'very good': around five in ten visitors (52%) rated the quality of service experienced in pubs and restaurants as being 'very good' and a further 36% rating the service as 'good'. In terms of the facilities, views were fairly evenly divided, with 38% rating the quality of facilities as 'very good' and around four in ten visitors (44%) believing it was 'good'. Overall the quality of service achieved a slightly higher rating (+4.35) when compared with the facilities (+4.18).

Figure B-15 - Rating of pubs/restaurants by visitors to Ross and Cromarty Enterprise (%)

Base: all visitors to Ross & Cromarty area who visited pubs and restaurants



Note: (*) - less than 1%

As with other aspects of the Highland tourism product, visitors to the Ross and Cromarty area were very satisfied with both the quality of service and facilities on offer in Highland pubs and restaurants.

Overall levels of Satisfaction

Attitudes and Opinions about the Ross and Cromarty area

Visitors to the Ross and Cromarty area were provided with a series of “attitude statements” about various aspects of the area, and asked to indicate the extent to which they agreed or disagreed with each of them. A mixture of both positive and negative statements were included to reduce the effect of positive bias which often occurs. When respondents are given a list of positive statements, they are often predisposed to respond positively:

Table B-11 - Attitudes and Opinions in Ross and Cromarty (%)

Base: 405 visitors to Ross & Cromarty

	Agree strongly (+2)	Agree (+1)	Neither (-)	Disagree (-1)	Disagree strongly (-2)	Mean score
<u>POSITIVE STATEMENTS</u>						
- I would recommend Ross & Cromarty to others as a good place to visit on holiday	42	48	4	2	-	1.36
<u>NEGATIVE STATEMENTS</u>						
- There's not much to do in the area when it is raining	4	24	17	36	3	-0.13
- I expected there would be more places where I could hear traditional folk music in the area	3	12	39	22	2	-0.12
- Signposting to places of interest in the area needs to be improved	2	16	7	58	9	-0.61

Generally, the reactions to each of the attitude statements were fairly positive in nature. Individual analysis of each statement is shown below.

“I would recommend Ross & Cromarty to others as a good place to visit on holiday”

Nine in ten visitors (90%) ‘agreed strongly or agreed’ with this statement. Only 2% of visitors disagreed (n=7). The following types of visitor more likely to agree with this statement were: visitors on a centred holiday (94%), visitors staying in self-catering accommodation (94%) and visitors from the Highlands area (92%).

“There’s not much to do in the area when it is raining”

Around four in ten visitors indicated (39%) that they ‘disagreed or disagreed strongly’ with this statement. Visitors more likely to disagree with this statement were: visitors aged 35-54 years (47%), those in the ABC1 social classes (44%), those staying in self-catering accommodation (53%), visitors interviewed in Wester Ross (45%), those on holiday (41%) and those who had been to the Highlands before (44%).

Of the 28% who ‘agreed strongly or agreed’ with this statement visitors more likely to agree were: visitors aged 55+ years (34%), visitors staying in hotels and guest houses (37%), and visitors originating from the Highlands (38%). Therefore, although the majority of visitors disagreed with this statement, a significant minority indicated agreement, suggesting that there is a need for more wet weather facilities.

“I expected there would be more places where I could hear traditional folk music in the area”

Around four in ten visitors (39%) were unable to comment on this statement, however, 15% did ‘agree strongly or agree’ and a further 24% ‘disagreed or disagreed strongly’ with this statement. Visitors more likely to have expected traditional folk music were: visitors on a touring holiday (25%), visitors staying in bed and breakfasts (24%) and visitors from overseas (25%).

“Signposting to places of interest in the area needs to be improved”

Two-thirds of visitors disagreed with the above statement about signposting (67%). However, 18% of visitors (73 out of 405 visitors) indicated that they agreed with this statement representing a significant proportion of the area’s visitor market, indicating that for many this is a problem which should be addressed. Visitors more likely to believe that signposting should be improved were: visitors on a centred/touring holiday (23%), visitors staying in bed and breakfasts (24%), overseas visitors (22%) and first-time visitors to the Highlands (23%).

The visit to Ross and Cromarty area: Expectations vs. Reality

Another measure of visitor satisfaction was obtained by asking visitors how their trip to the Ross and Cromarty area had compared with what they had expected.

Table B-12 - How the trip to Ross and Cromarty compared with expectations (%)

Base: 405 visitors to the Ross & Cromarty area

	Easter Ross	Wester Ross	Ross and Cromarty area
Better than expected (+1)	20	32	25
About the same as expected (-)	62	53	58
Worse than expected (-1)	1	1	1
Didn't know what to expect	17	14	15
Total:	100	100	100
Mean score	+0.22	+0.36	+0.29

Encouragingly, a quarter of visitors described their visit in the Ross and Cromarty area as being 'better than expected' (25%). Visitors who were more likely to respond in this way were: visitors on a touring holiday (32%), visitors staying in bed and breakfasts (31%) and visitors interviewed in the Wester Ross area (32%).

Around six in ten visitors (58%) indicated that their visit to the Ross and Cromarty area was about what they expected. Not surprisingly, this was highest amongst visitors from Scotland (81%).

Those visitors who described their trip to the Ross and Cromarty area as having been better than expected, were asked for their reasons. A large number of reasons were provided, although only five were mentioned by 12% or more of visitors:

- The weather (38%)
- Scenery picturesque (35%)
- More to see and do than expected (14%)
- General beauty of area (14%)
- Friendly locals (12%)

Improvements which would have made the visit more enjoyable

Finally, in terms of satisfaction, visitors were asked what improvements could have been made by the local bodies responsible for tourism to improve their trip to the Highlands. Responses from 3% or more of respondents are shown below.

Table B-13 - Improvements which would make trip to Highlands more enjoyable (%)

Base: 405 visitors to the Ross & Cromarty area

	Easter Ross	Wester Ross	Ross & Cromarty
Not enough tourist information	6	8	7
More/better signposting	5	6	5
Toilet facilities - more needed	7	2	5
Too expensive	4	5	4
Food/meals - any reference to poor quality/value	3	6	4
Any references to improvements to accommodation	4	4	4
Roads - any mention of improvements needed	4	3	3
Nothing at all/very little	54	56	55
Total:	100	100	100

Encouragingly, over half the visitors to the Ross and Cromarty area did not believe the local bodies responsible for tourism to the Highlands could have done anything to improve their trip (55%). There were no significant variations in these views amongst the main market segments. Amongst those who did think improvements could have been made, a variety of responses were given. The three main concerns voiced by visitors centred around a lack of tourist information (7%), signposting (5%) and toilet facilities (5%). These three suggestions were more frequently cited by the following market segments:

- *“Not enough tourist information”*: visitors aged 15-34 years (11%), visitors on touring holidays (11%), visitors caravanning and camping (11%) and first-time visitors to the Highlands (15%);
- *“More/better signposting”*: visitors aged 35-54 years (7%) and visitors on a mixed holiday (11%);
- *“Toilet facilities - more needed”*: visitors using self-catering accommodation (8%), visitors from the Highlands (15%) and those on a day out from home (21%).

Local Foods and Drinks Have Purchased/Intend to Purchase

- Visitors were shown a list of local foods and drink and asked to select any which they may have bought or intended buying during their visit in the Ross and Cromarty area. The three most popular products were bakery products (47%), shortbread (46%), and malt whisky (33%):

Table B-14 - Food and Drink Have Bought/Intend to Buy (%)

Base: 405 visitors to the Ross & Cromarty area

	Easter Ross	Wester Ross	Ross & Cromarty area
Bakery products	51	43	47
Shortbread	45	48	46
Malt whisky	32	34	33
Oatcakes	26	33	29
Preserves (chutneys, jams, honeys)	23	29	26
Haggis	24	26	25
Smoked salmon	17	26	21
Soft fruit	19	17	18
Game products (pates, burgers, etc.)	8	8	8
Other smoked foods	5	12	8
None of these	23	15	19

Visitors interviewed in Wester Ross were more likely to purchase or be intending to purchase the products listed than visitors in Easter Ross: 23% of visitors in Easter Ross indicated they would not be buying any of these products compared with 15% of visitors in the Wester Ross area. This is likely to be a reflection of the larger proportions of first time and overseas visitors in Wester Ross.

When comparing the top three products with visitor types there are some variations: both the shortbread and malt whisky products were more popular amongst visitors from outwith Scotland: 62% of visitors from the rest of the UK and 45% of overseas visitors indicated they would or had bought shortbread compared with 27% of visitors from Scotland; 49% of overseas visitors and 40% of visitors from the rest of the UK were more likely to be interested in malt whisky products compared with 16% of visitors from Scotland.

Expenditure in Ross and Cromarty

Visitors to Ross and Cromarty were asked to indicate how much they had spent on their trip to the Highlands. With only 19 respondents on a day trip, this obviously does not represent a large enough sample to undertake any detailed analysis of their spending patterns. Consequently, the analysis of expenditure provided below refers to the 386 respondents who stayed overnight (tourists).

Respondents were first of all asked how much they had spent on various elements of their trip over the previous 24 hours on themselves and any other members of their party. They were then asked how many people this expenditure had covered. Table B-15 provides the average daily expenditure by respondents (including that spent on others) and daily expenditure per person, per day:

Table B-15 - Amount spent per day in Ross and Cromarty

Base: 386 visitors to the RACE area staying overnight in the Highlands
3,080 visitors to the Highlands staying overnight

	Spend per night (including on others)....		Spend per night per person....	
	in RACE area	in the Highlands	in RACE area	in the Highlands
Accommodation	£34	£38	£16	£18
Food and drink (outside accommodation)	£20	£23	£9	£10
Entertainment	£3	£5	£1	£2
Shopping	£11	£14	£5	£7
Transport	£11	£12	£5	£6
Total:	£79	£92	£37	£43

Typically, respondents in the RACE area spent £79 per day during their trip to the Highlands on themselves and others in their party, a significantly lower amount than the average in the Highlands as a whole. This averaged out at a spend of £37 per person per day. Accommodation spend accounted for the largest proportion of this expenditure (43%) followed by food and drink (24%).

The following market segments spent *more* on average per person per day:

- those aged 55+ years (£41), those staying in two or three locations (£41), those staying in bed and breakfast establishments (£45) and in hotels (£52), and overseas visitors (£39).

The following markets spent *less* on average per person, per day:

- those aged under 35 years (£31), those who were caravanning/camping (£29) or self-catering (£33), and Scots visitors (£35).

By applying the average length of stay figures to the daily expenditure estimates indicated in Table B-16, it is possible to obtain estimates of spending on a “per trip” basis. The table below provides an indication of the average spending on the trip which took place within Ross and Cromarty. Figures are also provided for comparison of spend per trip to the Highlands as a whole:

Table B-16 - Amount spent per trip

Base: 386 visitors to the RACE area staying overnight in the Highlands
3,080 visitors to the Highlands staying overnight

	Spend per trip (including on others).....		Spend per person per trip.....	
	in RACE area	in the Highlands	in RACE area	in the Highlands
<i>Average length of Stay</i>	<i>4.0 nights</i>	<i>7.0 nights</i>	<i>4.0 nights</i>	<i>7.0 nights</i>
Accommodation	£136	£266	£64	£126
Food and drink (outside accommodation)	£80	£161	£36	£70
Entertainment	£12	£35	£4	£14
Shopping	£44	£98	£21	£49
Transport	£44	£84	£21	£42
Total:	£316	£644	£148	£301

Typically, respondents in Ross and Cromarty spent just over £300 during their trip to the area on themselves and others in their party. This averaged out at a spend of around £150 per person on their trip to the area. Given the average length of stay in the Highlands as a whole was 7 nights, the per trip expenditure was considerably higher (£301 per person).

The following market segments spent *more* on average per person per trip:

- those aged 55+ years (£189), ABC1s (£160), those who were staying in the one location on their trip (£186), those who were self-catering (£205), and visitors from other parts of the UK (£186).

The following markets on the other hand spent *less* on average per person, per trip in the RACE area:

- those aged under 35 years (£109), C2DEs (£130), those on touring holidays (£79), those staying in bed and breakfast establishments (£108) or who were camping/caravanning (£96), and Scots visitors (£136).

By multiplying the trip spending figures by the average party sizes, it is also possible to obtain estimates of the average party spend in the RACE area amongst the different market segments. This is summarised in Table B-17 below:

Table B-17 - Spending per party in Ross and Cromarty

Base: 386 visitors to the RACE area staying overnight in the Highlands

	Spend in Ross and Cromarty				
	Spend per person per day	Average length of stay	Spend per person per trip	Average party size	Spend per party per trip
<i>Age</i>					
15-34	£31	3.5 nights	£109	2.6 people	£283
35-54	£39	3.8 nights	£148	2.7 people	£400
55+	£41	4.6 nights	£189	2.2 people	£416
<i>Social Class</i>					
ABC1	£38	4.2 nights	£160	2.4 people	£384
C2DE	£37	3.5 nights	£130	2.6 people	£338
<i>Type of Holiday</i>					
Centred	£38	4.9 nights	£186	2.6 people	£484
Staying in 2 or 3 locations	£41	3.4 nights	£139	2.2 people	£306
Touring	£36	2.2 nights	£79	2.1 people	£166
<i>Accommodation Used</i>					
Hotels/Guesthouses	£52	3.0 nights	£156	2.2 people	£343
Bed and Breakfasts	£45	2.4 nights	£108	2.2 people	£238
Self-catering	£33	6.2 nights	£205	3.2 people	£656
Caravan/Camping	£29	3.3 nights	£96	2.3 people	£221
<i>Origin</i>					
Scotland	£35	3.9 nights	£136	2.5 people	£340
Other UK	£38	4.9 nights	£186	2.5 people	£465
Overseas	£39	2.0 nights	£78	2.2 people	£172
<i>Area</i>					
Easter Ross	£38	3.9 nights	£148	2.5 people	£370
Wester Ross	£38	4.1 nights	£156	2.4 people	£374
Total:	£37	4.0 nights	£148	2.5 people	£370

In terms of total trip spending per party in Ross and Cromarty, the average spend was around £370. The highest spenders were those staying in self-catering establishments (£656), a reflection of their long stays locally and larger party sizes. On the other hand, lowest spenders were those on touring holidays and overseas visitors (each at less than £200).

C. Multivariate Analysis

In the production of cross-tabulations in visitor surveys of this type, it is often difficult to isolate the factor(s) which are of most significance in influencing the pattern of visits to a particular area. Consequently, some multi-variate analysis was conducted on the datasets of respondents interviewed in the Ross and Cromarty area in an attempt to identify the key variables within the various market segments. This process was undertaken using the segmentation modelling program, **SPSS CHAID** (Chi-Squared Automatic Interaction Detector) which is described in some detail below.

Multi-Variate Analysis – the Process

SPSS CHAID is a segmentation modelling program designed for analysing categorical data. It is useful in any situation in which your overall goal is to divide a population into segments that differ with respect to a designated criterion. In a CHAID analysis, a dependent variable is selected and an explanation for any variation in this variable is sought by analysing the data in terms of a number of predictor variables (e.g. age, social class, lifecycle characteristics etc.).

In the case of the Highlands Visitor Survey, a number of predictor variables were applied to each of the subregional areas to identify significant relationships between variables. Predictor variables included age, social class, origin, presence of children and whether or not visitors were on a first time or a repeat visit to the Highlands. Each of the predictor variables was cross-tabulated with the dependent variable - the interview location, to establish the most significant relationships.

This analysis identified the key market segments for both Easter Ross and Wester Ross, illustrating which of the lifestyle characteristics were most significant, and consequently which market segments would be likely to produce most *gains* to the two areas if they were targeted.

This analysis of the Highlands Visitor Survey data at the sub-regional level identified twelve market segments. Their composition, together with their share of the total tourism market to the Highlands is indicated below:

Market Segments	Share of the Highlands visitor market
• Highland residents	6%
• Other Scots residents, aged under 35 years, no children in household	5%
• Other Scots residents, aged 35-64 years, no children in household	10%
• Other Scots residents, aged under 65 years, children in household	7%
• Other Scots residents, aged 65+ years	4%
• Other UK residents, 1st ever visit to the Highlands, aged under 45 years	6%
• Other UK residents, 1st ever visit to the Highlands, aged 45-54 years	2%
• Other UK residents, 1st ever visit to the Highlands, aged 55+ years	3%
• Other UK residents, repeat visit to the Highlands	29%
• Overseas residents, children in the household	3%
• Overseas residents, no children in the household, 1st ever visit to the Highlands	17%
• Overseas residents, no children in the household, repeat visit to the Highlands	6%

For the purpose of clarity, a definition of these market segments is provided below:

Highland residents: those who live within the Highlands council area (inc. Moray)
Other Scots: those who live outwith the Highland council area
Other UK: those who reside in England, Wales and Northern Ireland
Overseas: those who live outwith the United Kingdom (inc. Ireland)
Children: classified as a dependent minor aged under 18 years
1st visit: 1st ever visit to the Highlands of Scotland
Repeat visit: those who have visited the Highlands at least once before

An analysis of the segmentation analyses of the respondents interviewed in both Easter Ross and Wester Ross follows overleaf.

Visits to Wester Ross – 6% Share overall

Dependent and Predictor Variables

Dependent variable: those visiting Wester Ross;
 Predictor variables: age; social class; origin; incidence of children present; 1st time/repeat visitors

Key Predictor Variable

Origin of Visitors

Market Segmentation

In the following table, the first column (incidence of visits to the area) shows the percentage of each market segment which was attracted to Wester Ross. For example, 7% of other Scots residents aged under 35 with no dependent children visited Wester Ross. The second column shows the propensity of that group to visit the Wester Ross area in comparison with the average for other parts of the Highlands. For example, the same group of other Scots residents aged under 35 and without any dependent children are 31% more likely to visit Wester Ross than average. Visitors who are less likely than average to visit the area are shown as a negative percentage.

Market Segment	Incidence of visits to area	Above/below average incidence of visiting
- Other Scots residents, aged 35-64, no children in household	8%	+46%
- Other Scots residents, aged under 35, no children in household	7%	+31%
- Other UK residents, on repeat visit	7%	+30%
- Overseas residents, no children in household, on repeat visit	7%	+23%
- Other UK residents, on 1 st ever visit to Highlands, aged 45-54	7%	+12%
- Other Scots, aged 65+	6%	+8%
- Other UK residents, on 1 st ever visit to Highlands, aged under 45	5%	-15%
- Overseas residents, no children in the household on 1 st ever visit	4%	-21%
- Highland residents	4%	-33%
- Other Scots residents, aged under 65, children in household	1%	-77%
- Other UK residents, on 1 st ever visit to Highlands, aged 55+	1%	-81%
- Overseas residents, children in the household	1%	-84%

Wester Ross was most popular amongst visitors from Scotland outwith the Highlands – particularly those without any children in their household. Similarly, the area was popular amongst overseas visitors without any dependent children. Conversely, it was less popular than average amongst overseas residents who had children in their household.

Visits to Easter Ross – 7% Share overall

Dependent and Predictor Variables

Dependent variable: those visiting Easter Ross;
 Predictor variables: age; social class; origin; incidence of children present; 1st time/repeat visitors

Key Predictor Variable

Origin of Visitors

Market Segmentation

In the following table, the first column (incidence of visits to the area) shows the percentage of each market segment which was attracted to Wester Ross. For example, 20% of other UK residents on their first ever visit and aged 55+ years who were visiting the Highlands visited Wester Ross. The second column shows the propensity of that group to visit the Wester Ross area in comparison with the average for other parts of the Highlands. For example, the same group of other UK residents on their first ever trip to the Highlands and aged 55+ years are 19% more likely to visit Wester Ross than average. Visitors who are less likely than average to visit the area are shown as a negative percentage.

Market Segment	Incidence of visits to area	Above/below average incidence of visiting
- Other Scots, aged 65+	16%	+141%
- Highland residents	10%	+52%
- Other Scots residents, aged 35-64, no children in household	9%	+30%
- Other UK residents, on 1 st ever visit to Highlands, aged 55+	8%	+26%
- Other UK residents, on repeat visit	8%	+15%
- Overseas residents, children in the household	6%	-7%
- Other UK residents, on 1 st ever visit to Highlands, aged under 45	6%	-8%
- Other Scots residents, aged under 65, children in household	4%	-37%
- Overseas residents, no children in the household on 1 st ever visit	4%	-39%
- Other Scots residents, aged under 35, no children in household	3%	-51%
- Overseas residents, no children in household, on repeat visit	3%	-56%
- Other UK residents, on 1 st ever visit to Highlands, aged 45-54	2%	-63%

Easter Ross was more popular amongst UK residents – particularly Highland residents and those from other parts of Scotland. All five segments with above average likelihood to visit were from within the UK – overseas segments all had lower than average likelihood to visit the area. There was also some indication that the area held greatest appeal amongst older visitors – three of the top 5 segments for the area comprised people aged over 35 years.

D. Appendix 1: Social Class

- A**
- UK: 3% of the population;
 - These are professional people, or are very senior in business or commerce, or are top civil servants
 - Retired people, previously grade A, and their widows
- B**
- UK: 18% of the population;
 - Middle management executives in large organisations, with appropriate qualifications
 - Principle officers in local government and civil service
 - Top management or owners of small business concerns, educational and service establishments
 - Retired people, previously grade B, and their widows
- C1**
- UK: 27% of the population;
 - Junior management; owners of small establishments; and all others in non-manual positions
 - Jobs in this group have very varied responsibilities and educational needs
 - Retired people, previously grade C1 and their widows
- C2**
- UK: 24% of the population;
 - All skilled manual workers, and those manual workers with responsibility for other people
 - Retired people previously grade C2, with a pension from their job
 - Widows, if receiving pensions from their late husband's job
- D**
- UK: 16% of the population;
 - All semi skilled and unskilled manual workers, and apprentices and trainees to skilled workers
 - Retired people, previously grade D, with a pension from their job
 - Widows, if receiving a pension from their late husband's job
- E**
- UK: 12% of the population;
 - All those entirely dependent on the state long term, through sickness, unemployment, old age or other reasons. Those unemployed for a period exceeding 6 months (otherwise classified on previous occupation)
 - Casual workers and those without a regular income
 - Only households without a chief wage earner are coded in this group

E. Appendix 2: Questionnaires

